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Delaware Tourism Policy Study

Delaware State Travel Service
Division of Economic Development

DELAWARE TOURISM POLICY STUDY

May 31, 1979

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State of Delaware

Delaware State Travel Service
Division of Economic Development
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U.S. Travel Data Center

in association with

Fothergill/Beekhuis Associates

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DELAWARE TOURISM POLICY STUDY

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This Study was prepared at the request of the Delaware Department of Community Affairs and Economic Development to identify tourism resources in the State, determine existing and potential markets for these resources, analyze the costs and benefits of tourism to the State, develop a proposed tourism policy and suggest ways to monitor tourism trends in response to policy implementation.

On September 23, 1977, the U.S. Travel Data Center, in association with Fothergill/Beekhuis Associates, submitted "A Proposal to Conduct Studies to Develop a Tourism Development Policy for the State of Delaware," in response to the Department's Request for Proposal of August 31, 1977. A contract for the "Delaware Tourism Policy Study" was signed on August 1, 1978.

After a series of tourism resource site inspections, interviews with State officials concerned with economic and resource development, and discussions with representatives of the travel industry in Delaware, a preliminary report was submitted on November 29, 1978. Based upon comments and recommendations received concerning the preliminary report, this final report was prepared.

Dr. Douglas C. Frechtling, Director, U.S. Travel Data Center, served as Project Director for the Delaware Tourism Policy Study, and was responsible for the research for and preparation of Chapters II and IV. Jeanne V. Beekhuis, Principal, Fothergill/Beekhuis Associates, was responsible for researching and preparing Chapter I. William R. Fothergill, Principal, Fothergill/Beekhuis Associates, was responsible for the preparation of Chapter III. Jan L. Nichols, Communications Coordinator, U.S. Travel Data Center, prepared the detailed Inventory of Tourism Resources in Appendix A.

The members of the study team communicated regularly, spent many days interviewing public and private representatives of tourism interests, and inspected tourism resources throughout the State.

In addition to the individuals named in the report, the authors wish to especially recognize the aid and counsel of Donald R. Mathewson, Manager, Delaware State Travel Service, and Wendy J. Lindquist, Travel Representative. Without the help of these individuals, members of the Delaware Tourism Advisory Board, and other representatives of the travel industry in Delaware, this report could not have been written.

Washington, D.C.
May 31, 1979

DELAWARE'S TOURISM RESOURCES AND MARKETS

Resources for Tourism Development

Delaware is a compact State, well situated in relation to market areas in the densely populated Northeast. It contains an interesting variety of resources for tourism development, with particular strengths in natural resources for water-based recreation and in historic and cultural facilities.

The range and character of the resource base for attracting and accomodating tourists is markedly different in each of Delaware's three counties, as summarized below.

New Castle County

New Castle County is an urban region generally characterized by high population density and a pleasant, rolling landscape. The Brandywine Valley, which extends from Wilmington into nearby Pennsylvania, is particularly rich in historic and cultural resources.

The county has a comprehensive transportation network providing excellent access via interstate highway, air and rail. To accomodate and amuse visitors, there are over 2,800 rooms in 41 hotels and motels, many fine restaurants, and a broad range of possibilities for sightseeing, outdoor recreation, shopping and evening entertainment. Four large hotels in the Wilmington vicinity have facilities for sizeable group meetings, banquets, and other functions (500 to 1,000 range).

On the negative side, the tourism plant is fragmented. Attractions and accomodations are scattered, rather than concentrated. There is no single dominant commercial attraction, such as a theme park, nor is there a convention center, which might act to unify the area.

Kent County

Kent County is characterized by the flat, rich agricultural landscape typical of the Eastern Shore. The main urban area is Dover, where the museums and other buildings in the State capital complex constitute a small-scale combination of attractions of significant merit. Delaware Bay and the extensive coastal wetlands adjacent to the Bay provide excellent opportunities for boating, fishing and hunting.

Kent County's accomodations plant consists of 800 rooms in 16 motels, with the large majority concentrated in Dover. There is also a range of good restaurants, shopping facilities, and entertainment to service tourism.

The county has a good north-south highway system, in which U.S. Route 13, U.S. Route 113 and Delaware Highway 1 are the principal arterials. Delaware Highway 9, linking the coastal wetlands, is the State's only designated scenic highway. East-west highway transportation is less advanced. There are no multi-lane highways to provide easy access to Kent County from Washington and Baltimore,

so traffic originating in these metropolitan areas and bound for Kent County must cross the Chesapeake Bay via the Chesapeake Bay Bridge and then utilize two-lane secondary roads as arterials.

The flat topography of Kent County is judged generally uninteresting for sightseeing, but could be an asset for bicycling. Other resource weaknesses identified were that Kent County has only one State park and it has no unifying theme or single outstanding cultural or natural attraction.

Sussex County

Delaware's outstanding tourism asset is the fine strand of Atlantic Beach at the eastern edge of Sussex County. Complementing the ocean beaches are the relatively undeveloped coastal bays (Rehoboth, Indian River and Little Assawoman) and the broad mouth of Delaware Bay. The variety of opportunities for water-based recreation is excellent in this region.

There are extensive State parklands in Sussex County, encompassing prime coastline as well as inland areas with ponds and other natural refuge areas. The landscape, like that of Kent County, is largely flat and agricultural.

The tourism plant has developed almost entirely along the coast. It is low in density and encompasses a good variety of accomodations in campgrounds (over 3,800 sites), hotels and motels (over 1,500 rooms), and seasonal homes (about 7,000). During the summer season, tourists have a wide choice of restaurants, shops, amusements, and entertainment. However, the operational period for most commercial facilities reflects the strong seasonality of demand. Many establishments close shortly after Labor Day; very few remain open as late as November. Convention Hall in Rehoboth Beach (about 500 capacity) and a new motel with an indoor swimming pool may help to ameliorate seasonality problems.

The transportation network for tourist access to Sussex County is similar to that of Kent County, i.e., north-south corridors are good and east-west corridors are less well developed. Delaware Highway 1 is an asset for linking the coastal communities. Overall, the county's highway network is adequate to handle demand, except during the short peak summer season when serious congestion occurs regularly along several segments of the system.

Delaware's Tourism Markets Today

Volume

According to the National Travel Survey (NTS), U.S. households made 12.2 million person-trips into Delaware during 1977 on trips 100 miles or more away from home. However, the vast majority (nearly 80 percent) simply passed through, without stopping overnight, on their way to a destination in another state. Parties headed for Delaware destinations represented 2,165,000 (17.5 percent of all travel through the State) and those stopping overnight in Delaware on their way elsewhere accounted for 329,000 person-trips (2.5 percent).

Travel Mode

The transportation mode for 90 percent of NTS person-trips to Delaware destinations was the automobile, without camping equipment.

Seasonality

Overall, the high season is summer in Kent and Sussex Counties, and spring or fall in New Castle County.

Purpose

Travel for outdoor recreation represented over half of NTS person-trips to Delaware; business/convention travel was nine percent and sightseeing was one percent. However, business-related activities account for an estimated 85 percent of year-round occupancy at New Castle County and Kent County hotels and motels, and the majority of off-season occupancy at the Sussex County hotels and motels that remain open year-round.

The ocean beaches are the destination for the majority of visitors whose purpose is outdoor recreation, and swimming is unquestionably the most popular activity. However, Delaware annually attracts about 9,500 boat-owners, 18,500 fishermen, and 2,650 hunters from out-of-state.

Length of Stay

The vast majority (85 percent) of person-trips to Delaware destinations remained in Delaware at least one night, and over half (57 percent) stayed two to three nights. But, among visitors to Winterthur, only about 40 percent remain in the area more than one day.

At New Castle and Kent County hotels and motels, businessmen average two to two and one-half nights; pleasure travelers, slightly over one night.

At the low end of the scale, day trips may represent as much as 94 percent of all visits to the Delaware shore area and, on a peak summer weekend or holiday, over 80 percent of the total seasonal and permanent population in Rehoboth may be day trippers. However, among those who remain overnight, the average stay is probably one week, combining cottages, apartments, hotels and campgrounds.

Origin of Visitors

Visitors to Delaware attractions come from scores of foreign countries as well as U.S. states and territories. The vast majority of Delaware's visitors, however, travel from nearby places. The most important tourism generating areas for Delaware are consistently Delaware itself, Pennsylvania, Maryland, Virginia, and the District of Columbia. Among NTS travelers, who by definition must be at least 100 miles away from home, these states constituted 75 percent of all person-trips.

Operational Problem Areas

Analysis of the operational characteristics of accommodations facilities indicates the principal problem areas or needs in each of the three counties to be:

New Castle County: More visitors are needed to augment occupancy at Wilmington area hotels and motels. Additional sightseeing/touring volume on weekends and during the summer would supplement existing business/con-

vention volume midweek. More business and convention volume during the week may also be needed to fill the new Radisson Wilmington Hotel.

Kent County: More visitors are needed to improve low hotel/motel occupancy rates throughout the year, but especially on weekends.

Sussex County: Congestion in July and August is a serious problem. On the other hand, volume is needed to bolster shoulder season occupancy.

Potential Market Development

Range of Development Alternatives

To facilitate subsequent evaluations, a matrix was developed which categorizes both existing tourism in Delaware and the range of potential development alternatives into a simple framework. The matrix can be adapted to cost/benefit analysis and will allow a systematic attack to be mounted on the problem areas identified above.

Competitive/Complementary Resources

Recognizing the combined effects of transportation accessibility and competitive attractions in Delaware's market area, the following recommendations were developed for marketing strategy:

1. Off-season promotion for the Delaware shore area should concentrate on those areas which comprise the high-season market: the Washington, D.C./Maryland/Virginia SMSA, the Baltimore SMSA, and areas of middle and western Pennsylvania for which the Delaware shore is at least as accessible as other competing shore areas.

2. Delaware's hunting, fishing and boating opportunities should be promoted primarily in markets in the more northerly sections of the Northeast megalopolis, such as Philadelphia, Trenton and New York, which are not intercepted by the Chesapeake Bay area.

3. In that scenic, historic and cultural attractions generally have a wider geographic marketing potential than outdoor recreation, joint regional promotion efforts are suggested. Combination packages might be developed to include Delaware attractions and complementary attractions in neighboring states.

THE VALUE OF TOURISM TO DELAWARE

During 1977, 13 million non-resident travelers visited Delaware and spent a total of 10 million equivalent days in the State. These visitors spent $313 million during their stay, which became business receipts for Delaware industry. This tourism-generated income is comparable to all cash farm income in Delaware, which was $281 million in 1975.

Delaware's tourism industry in turn directly provided nearly 15,000 jobs, for about six percent of the State's total non-agricultural payroll employment. The employees in these businesses earned $108 million directly from the non-resident visitor.

The impact of these visitors on the Delaware economy did not stop at the retail level. Indirect or secondary effects were created as the travel-related business firms purchased goods and services from wholesalers and others in the State, and as the employees spent their payroll income. Including the secondary effects on employment and payroll, the visitors' $313 million expenditure created 30,000 jobs paying nearly $233 million in wages and salaries. Total primary and secondary employment accounted for over 12 percent of the jobs in Delaware during 1977.

New Castle County, the most highly urbanized and industrialized of Delaware's three counties, garnered the most in travel spending and travel-generated jobs and payroll. However, relative to the size of the local economy, non-resident travel was most important in Sussex County.

The non-resident visitor required certain goods and services from the State during 1977. These included highways, police and fire protection, parks and fish and wildlife facilities. The State spent $12 million in providing these goods and services to her visitors. Over half of this related to highways, streets and roads for the auto traveler.

In return, the visitors paid taxes on such items as motor fuel and hotel rooms, bought hunting and fishing licenses, and paid park user fees. Their expenditures gave rise to mercantile tax, corporate income tax, personal income tax, and other receipts for the State. In total, visitors generated over $14 million in revenue for the State, or about 4.6 cents for every dollar they spent.

State government benefits from non-resident travelers in Delaware. In 1977, the State received $2.5 million more in revenue than it spent to service non-resident travelers. On the average, each traveler left behind a net amount of 20 cents for the State treasury.

POLICY ANALYSIS

The economic and market analyses lead to three basic conclusions which have direct effect on tourism policy and promotional strategy:

1. The economic contribution of tourism to the State of Delaware should be protected; tourism should be recognized and supported as a matter of State policy.

2. Special efforts should be made to exploit strategic marketing opportunities in each county to attract quality markets.

3. The importance of seasonal homes to Delaware tourism should be recognized, and support for continued well-planned development should be an integral part of State policy.

In regard to the current status of tourism policy in Delaware, the Delaware State Travel Service budget for FY79 was at a bare subsistence level -- $77,000. The proposed budget for FY80 is $467,100, a level at which a meaningful program can be implemented. (The proposed budget had not been approved at the time this study was submitted.)[1]

1 D.S.T.S. Note: The $467,000 level of funding for the Delaware State Travel Service in FY80 was approved by Delaware's General Assembly in June, 1979.

For the future, Delaware can define a tourism policy from all or part of the following four structural alternatives -- depending on the degree of commitment that is judged to be justified.

First Alternative: Status Quo

The first alternative is to maintain the status quo, that is, continued subsistence-level promotion. The immediate benefit is a minimum expenditure of State funds. The risk is that Delaware may lose its quality markets to its more promotion-minded neighbors, leaving Delaware with a higher proportion of day visitors.

Second Alternative: Increased Promotion

The second alternative is a policy of increased promotion. A budget in the $500,000 range is justified on two bases. First, analysis of the competition shows that, on a per capita basis, Delaware currently spends less for tourism promotion than any other state or territory. A budget of $500,000 would be competitive. Second, State revenues from the six percent accomodations tax were $838,000 in 1977, which would more than cover a $500,000 budget. A relationship between tourism promotion and tourism tax receipts is seen to be valid.

Given an adequate budget, a two-part promotional strategy is proposed:

1. A State campaign to protect and increase the economic return from tourism ($313 million in expenditures and 30,000 jobs in 1977).

2. A county campaign to implement specific promotional strategies on a matching fund basis.

The proposed State campaign, at a $400,000 expenditure level, would concentrate on building an image of Delaware as a tourist destination. The campaign would serve as a backdrop for local promotional programs and for efforts to stimulate capital investment in new tourism facilities. Major media would be employed in target markets, selected according to criteria for each aspect of Delaware's tourist product.

The county campaign, at a $100,000 level, would be geared to a separate strategy for each county.

New Castle County: To obtain more overnight visitors on weekends and in the summer -- which are defined as specific target opportunities for New Castle County -- a joint promotion program involving the county's museums and hotels and the State is proposed. The strategy could generate an estimated 53,000 room-nights in local hotels, 176,000 museum visits, about $4.7 million in tourist expenditures, and about $214,000 in State receipts. Proposed State Budget: $50,000

Kent County: Assessment of Kent County's tourism assets and market opportunities suggests a dual promotion strategy based on developing an annual series of 20 special interest events on weekends and on attracting seminars and meetings in midweek. With State support, considerable imagination and determination, and widespread local participation, this program could result in 14,000 room-nights in local hotels, $1.2 million in total expenditures,

and $55,000 in State receipts.
Proposed State Budget: $25,000

Sussex County: It is estimated that a State-local campaign to promote the shore in the shoulder months -- May-June and September-October -- based on good weather, multiple recreation opportunities and low prices, could help offset Sussex County's seasonality problem. Anticipated effects are 31,000 room-nights in local hotels, $2.5 million in total expenditures, and $113,000 in State receipts.
Proposed State Budget: $25,000

With an expanded tourism promotion program, two organizational changes are proposed:

1. Extend the life of the Tourism Advisory Board (TAB), which was created to monitor this study, to serve as a permanent advisory board on policy matters.

2. Elevate the Delaware State Travel Service to full "Division" status, making it the Division of Tourism in the Department of Community Affairs and Economic Development.

Third Alternative: Increased Overall Concer

The third policy alternative is one of increased overall concern for non-promotional aspects of tourism development. A means is needed to improve the tourism input to policy decisions in State government. In addition to general issues, a total of 23 specific issues -- ranging from sales tax and private investment on public lands, to a theme park, to marine recreation and bicycle trails -- that affect or are affected by tourism development were identified. Probably the most difficult, and potentially the most costly, issue is the congestion that is projected for the Sussex County shore area by the Division of Highways if present trends continue and new highways are not built.

As a response to these issues, it is proposed that a new State Tourism Planning and Development Agency be established. It could be included in the Division of Tourism or, because of the multi-disciplinary implications, it could be located in the Office of the Governor as an Interagency Council. As part of the proposed Planning and Development Agency, two development funds of about $500,000 each are proposed: one to channel funds into appropriate public tourism projects to facilitate implementation and one to make loans to private projects deemed to be in the public interest. Further study is required to define the need and efficacy of this proposal more precisely.

Fourth Alternative: A Major New Concept

A fourth alternative is proposed as a major new concept in which the State would encourage development of large-scale seasonal home communities in the "back bay" area west of Rehoboth, Indian River and Little Assawoman Bays. This is seen as the area of the next major wave of tourism growth after oceanfront land is saturated. Based on infrastructural requirements, large-scale development is proposed -- 3,000 acres, 9,000 seasonal homes, 30,000 people on peak days, $45 million annually in new tourist expenditures, and $2 million in annual State receipts.

Two approaches are suggested for consideration. First, a traditional approach could be employed in which the State would encourage private development of the lands according to State and county plans and guidelines. Second, a new State Development Authority is proposed for consideration. This Authority would buy land, provide utilities and roads, and sell tracts to private developers for construction of seasonal homes. The advantages of the latter approach would include better State control of the location, pace and quality of development and financial benefits to the State due to appreciation of land values.

The four policy alternatives discussed above represent varying degrees of commitment by the State to tourism development. They are presented for consideration by State officials, legislators, the tourism industry, and the people of Delaware to determine the kind of tourism development program they feel would be in their own best interest.

MONITORING TOURISM DEVELOPMENT

It is essential that the State monitor trends in tourism in the public and private sectors. A comprehensive Tourism Monitoring System (TMS) is recommended, providing annual and monthly, regional and statewide data on changes in tourism-related usage of State facilities and services, and in the composition of the Delaware tourism market. These data comprising the TMS are readily available, and can be analyzed with little additional cost to the State. The return, however, can be substantial, allowing Delaware to evaluate its tourism development programs and policies, identify and analyze problem areas such as the impact of gasoline shortages on the State, and determine future strategies to maximize the net contribution of tourism to the State economy.

CHAPTER I: DELAWARE'S TOURISM MARKETS AND RESOURCES

Chapter I will lay the basic framework for the evaluations in Chapters II and III. The two major analytic subdivisions of Chapter I cover, respectively, resources and markets for tourism development in Delaware. The objectives of these analyses are to describe the essential characteristics of these basic tourism components as they presently exist in Delaware, and to identify strengths and weaknesses in the present mix. The third subdivision of the chapter is an interpretive synthesis of the first two sections directed toward identifying potential markets which might be considered for future development.

The personality of tourism in Delaware has been shaped over time by its unique combination of many characteristics. Some are inexorably fixed, including geographic location, topography and historical attributes. Other features -- such as population distribution, transportation networks and economic base -- will undoubtedly change to some degree over the next decade, but could not realistically be viewed as variables. These basic resources, which must be accepted as fundamental in any new tourism development policy to be contemplated, are discussed in the first section following. The second section will deal with "developed" tourism resources, such as attractions, accomodations facilities and events, where additions and deletions may be expected on a continuing basis. These developed resources will be strongly affected by public tourism policy and may be viewed as the raw materials for future planning.

Before proceeding, it is important to mention Delaware's recently completed State Comprehensive Outdoor Recreation Plan (SCORP),[1] which contains authoritative descriptions of Delaware's natural resources, historic development, demographic characteristics and transportation systems, as well as a comprehensive inventory of Delaware's outdoor recreation resources. In that outdoor recreation resources are very important to tourism, the SCORP will be referenced frequently in this report. To avoid duplication, however, subject areas covered in the SCORP will be summarized very briefly here and only in terms of the most salient features affecting tourism planning.

BASIC RESOURCES

Location and Size

Delaware's mid-Atlantic location, within easy reach of most people in the northeastern megalopolis, is a strong marketing asset. The City of Wilmington is situated on Interstate 95, the transportation backbone of the megalopolis, approximately halfway between New York and Washington, D.C.

Further, the small size of Delaware means that distances may be easily traversed. The State is the second smallest in the United States (after Rhode Island). The length of Delaware is only 96 miles and width varies from nine to 35 miles. Total area covered is slightly less than 2,000 square miles.

Natural Features

The bodies of water bordering and coursing through Delaware have been extremely important to historic and economic development in the State and provide outstanding resources for water-based recreation.

Probably the most important geophysical feature to tourism development is the broad strand of beach, backed by sand dunes, which borders the Atlantic Ocean

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1 Delaware's Statewide Comprehensive Outdoor Recreation Plan, Technical and Community Recreation Services Section of the Division of Parks and Recreation, Department of Natural Resources and Environmental Control, State of Delaware, 1979.

between Cape Henlopen and the Maryland state line, a distance of about 25 miles. Three large, shallow, saltwater bays behind the dune line together provide an additional 120 miles of shoreline. Rehoboth and Indian River Bays merge near Indian River Inlet, which gives access to the ocean. Little Assawoman Bay flows into Maryland's larger Assawoman Bay near the state line and reaches the ocean at Ocean City, Maryland.

Delaware Bay, narrowing into the Delaware River in the northern part of the State, borders the entire remaining eastern shore of Delaware (approximately 82 miles, according to the SCORP report). Marshlands and wetlands extending inland from the Bay accomodate a wide variety of wildlife, especially migratory and other game birds, fish, and furbearing animals.[1]

Numerous rivers, including several with distinctive scenic qualities, flow through the State and empty into Delaware Bay. The Chesapeake and Delaware (C&D) Canal cuts through northern Delaware south of Delaware City to connect the two bays for which it is named.

Also, inland freshwater ponds are scattered in locations throughout the State. An unusual feature of one southern Delaware pond area is a cypress grove, said by some to be the northernmost stand of these trees in the hemisphere.

The topography of Delaware is essentially flat, except in northern New Castle County where gently rolling, wooded hills are typical.

Summarizing, Delaware's water resources include the Atlantic Ocean, Delaware Bay, smaller bays along the coast, rivers, a man-made canal, and numerous inland ponds. In combination, these resources provide an unusual variety of opportunities for scenic sightseeing, swimming, boating, fishing, and hunting.

Population Distribution

Delaware's population is heavily concentrated in urbanized areas of New Castle County. Statistics for 1977 show a State total of 582,000 residents, of which approximately two-thirds live in New Castle County (397,800), one-sixth in Kent County (93,700) and one-sixth in Sussex County (90,200). Population density figures, which take land into account, demonstrate the differences even more dramatically. According to the 1970 census, density averaged 277 persons per square mile for the State as a whole. The variation, however, ranged from 881 persons per square mile in New Castle County (6,231 in the City of Wilmington) to 138 in Kent County and 85 in Sussex County. The percentage of population classified as urban was 91 percent in New Castle County, 39 percent in Kent County, and 14 percent in Sussex County.

Wilmington is Delaware's only Standard Metropolitan Statistical Area (SMSA) with a population above 200,000. According to the U.S. Census Bureau definition, the Wilmington SMSA bridges three states, including all of New Castle County (Delaware), Salem County (New Jersey), and Cecil County (Maryland). Population for the SMSA in 1970 was 499,000, of which 80,386 (16 percent) lived in the City of Wilmington. Population statistics show that other municipalities in Delaware are quite small. The second and third largest municipalities in New

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1 Refer to SCORP for full list of species.

Castle County are Newark (21,298) and Elsmere (8,415). In Kent County, Dover, the State capital, has 20,532 residents. Seaford's population of 5,537 makes it the largest city in Sussex County. Milford, which is divided between Kent and Sussex Counties, has a population of 5,421.

Transportation Network

The most heavily traveled arterials connecting the northeastern megalopolis pass into and through Delaware. Interstate 95 traverses northern New Castle County from Newark through the City of Wilmington to the Pennsylvania state line near Naaman's Corner. As an alternative route to I-95 in Wilmington, Interstate 495 splits off from I-95 south of Wilmington, passes through the city's Port and industrial areas, and rejoins I-95 near Naaman's Corner. Interstate 295 branches off I-95 to cross the Delaware Memorial Bridge into New Jersey, where north-south travelers may choose parallel routings, the New Jersey Turnpike (toll road) or I-295 (no toll).

The next most important arterial in Delaware is U.S. Route 13, which is a major link in the East Coast's "Ocean Highway" and is the transportation spine of the Delmarva Peninsula. From Wilmington, U.S. 13 runs the full length of Delaware -- through Dover, Harrington, Seaford, Laurel and Delmar -- and then crosses into Maryland and proceeds southern to Virginia. Reaching the southern limit of the peninsula, it crosses the Chesapeake Bay Bridge and Tunnel, runs into Norfolk, Virginia, and then connects with U.S. Route 17 to points south. Another important arterial in Delaware is U.S. Route 113, which branches off U.S. 13 at Dover and travels on to Milford, Georgetown, Millsboro, Selbyville and points south.

Other nationally-numbered routes in Delaware with significance to visitor markets include U.S. 202 (Concord Pike), a route running northward from Wilmington to Pennsylvania where it connects with U.S. Route 1 and the Pennsylvania Turnpike; U.S. 301, which runs from Wilmington southwestward to Middletown and then through Maryland to the Chesapeake Bay Bridge and Annapolis; and U.S. 40, which parallels I-95 south of Wilmington. In southern Delaware, U.S. Route 9 is a two-lane east-west arterial connecting Laurel and Georgetown with Lewes and the ferry to Cape May, New Jersey.

Of the State-numbered routes, the most important is Delaware Highway 1, which links the beach communities along the Atlantic Ocean and then swings in a northwesterly direction from Rehoboth Beach to Milford, paralleling the Delaware Bay coastline about two to three miles inland. Delaware Route 9, the State's only designated scenic route, generally parallels U.S. 13 and is situated about halfway between U.S. 13 and the Delaware River/Bay. It is multilane between Wilmington and New Castle. It then narrows to two lanes at New Castle and proceeds south to the southern boundary of Dover Air Force Base, Dover, where it merges with U.S. 113. A variety of other State-numbered routes criss-cross the State.

An important point to be made is that Delaware's high-speed limited access and divided highway network is generally confined to northern New Castle County and to the north-south spines of the State (U.S. Routes 13 and 113 and Delaware Highway 1). Traffic originating in the Baltimore-Washington metropolitan area and bound for points in Kent and Sussex Counties must cross the Chesapeake Bay via the Chesapeake Bay Bridge and then utilize two-lane secondary roads as ar-

terials. This fact must be recognized in planning marketing strategy, whether or not highway improvements are contemplated.

There are several other elements of Delaware's transportation network that are important to tourism development. The Cape May-Lewes Ferry, mentioned above, crosses the mouth of Delaware Bay to connect with the Garden State Parkway that runs along the New Jersey shore. Philadelphia International Airport, situated less than 25 miles and about 25 minutes from Wilmington, serves as Delaware's airport. Amtrak's Metroliners stop at Wilmington, providing excellent passenger rail connections within and beyond the northeastern megalopolis. Interstate bus lines serve Wilmington and, to a limited degree, other points in the State. However, intercity public transportation is not widely available outside the Wilmington metropolitan area.

History and Economic Development

Delaware's history goes back to Henry Hudson, who sailed up the Delaware River and claimed the territory for the Dutch in 1609. Named for Lord de la Warr, Provincial Governor of Virginia, the State was first settled in 1631 by the Dutch at a spot called Zwaanendael, near Lewes. This first colony was wiped out by the Indians, but successful settlements were established by the Swedes and Dutch in the early 17th century, and by the English toward the end of the century. the 1700's saw boundary line disputes with Pennsylvania and Maryland. Disputes with the latter were settled when the Mason-Dixon line was established. Delaware participated in the Revolutionary War and Delawareans are particularly proud of the fact that, following the war, their State was the first to ratify the Constitution. Thus, the origin of Delaware's nickname, "The First State".

Delaware's importance in manufacturing and commerce dates from 1802, when Eleuthere Irenee du Pont opened his first powder mills on the banks of the Brandywine River. Today, Wilmington is one of the world's great chemical and industrial centers. Manufacturing is also significant in Delaware City, Newark, Dover, and Milford. Delaware's products include textiles and clothing, paper, leather goods, iron and steel products, refined oil, and foods. An interesting note is that the Apollo space suit originated in Dover, which is also the home of a major U.S. Air Force Base and the State government.

Agriculture provides the economic base for the southern part of Delaware. Poultry farming is a major industry. Other products include a variety of truck crops, corn, soybeans and potatoes. Future development in seafood production and processing and other marine-related industries holds tremendous potential in this region of Delaware.

Delaware's long history combined with economic well-being left a wealth of landmarks of historic interest to tourists. Beautiful estates and gardens have been opened to the public by the du Pont family. Perhaps even more significantly, individual landmarks and whole sections of towns, such as New Castle, have been carefully preserved or restored by interested citizens.

Delaware's economic life also constitutes a formidable force in attracting business-oriented tourism -- both individuals and groups. These and other developed resources for tourism in Delaware will be discussed in more detail in the section following.

DEVELOPED RESOURCES

Appendix A to this report contains a detailed inventory of Delaware's developed tourist resources. Major categories covered are attractions, events, outdoor recreation, support facilities (campgrounds, hotels and motels, restaurants), miscellaneous commercial facilities, and organizational groups (arts, cultural and civic). In the paragraphs below, the range of resources presented in the inventory will be summarized and evaluated, by category.

Attractions

The Resource Inventory lists over 100 public and private attractions in Delaware, of which over 55 percent are in New Castle County, about 25 percent in Kent County, and slightly less than 20 percent in Sussex County.

New Castle County

New Castle County's attractions are primarily oriented to history and culture. There are over 40 museums and historic sites and several theaters for the performing arts. Another type of interest is served by industrial plant tours for visitors. About two-thirds of New Castle County's attractions are operated by the private sector and about one-third by the public sector.

Geographically, the museums and historic sites are dispersed throughout the county, with significant concentrations in the Brandywine River Valley and in Wilmington, Newark, New Castle and Odessa. The theaters are in Wilmington and the industries offering tours may be found in Wilmington, Newark and Delaware City.

Across state lines are the Wheaton Glass Museum (New Jersey) and a cluster of museums, cultural sites and dinner theaters in the Chadds Ford/Kennett Square area of Pennsylvania. All are easily accessible from New Castle County and are rightly considered to be regional attractions.

An impressive number of New Castle County's attractions (about half) are listed in the Mideastern Tour Book published by the American Automobile Association (AAA) and/or Mobil Oil Company's Travel Guide, which are the nation's two most widely read tour guides. These attractions are Fort Delaware State Park; Old St. Anne's Episcopal Church in Middletown; historic New Castle and nine specific sites in the complex (Amstel House, Buena Vista, The Green, Immanuel Church, Old Dutch House, Old Presbyterian Church, Old Courthouse, the New Castle and Frenchtown Railway Ticket Office, and The Strand); the Wilson-Warner House and the Corbit-Sharp House in Odessa; and twelve attractions in Wilmington (Brandywine Park, Bringhurst Woods, Delaware Art Museum, Delaware Museum of Natural History, Grand Opera House, Hagley Museum, Henry Francis du Pont Winterthur Museum and Gardens, Old Swede's Church, Old Town Hall, Rodney Square, Wilmington and Western Railroad, and the site of Fort Christina).

In nearby Pennsylvania, the guide books list the Brandywine River Museum, Hillendale Museum and Longwood Gardens. Three attractions in the area -- Hagley Museum and Winterthur Museum in Delaware and Longwood Gardens in Pennsylvania -- are rated by AAA as "attractions of particular or unusual interest". AAA instructs its members to "see these, by all means, if time permits".

Kent County

Kent County's attractions, as detailed in the Resource Inventory, reflect a character different from that of the New Castle County attractions. Over 25 attractions are listed, the majority of which are in the Dover area. Some are connected with the State government, such as the Delaware State Museum, the Governor's Mansion, the Hall of Records, the Old State House, and the Visitor's Center. Other Kent County attractions include Dover Air Force Base, Dover Downs International Speedway, Delaware State College, and the Dover Heritage Trail Tours in Dover; the Maritime Museum and nearby Island Field Site and Archaeological Museum in Bowers Beach; the Southern Delaware Visitors Information Center, two historic sites and one gallery in Milford; four historic sites in Smyrna; and one historic site in Frederica.

About half of Kent County's attractions are listed in the AAA Tour Guide and/or the Mobil Travel Guide, including the Old State House, the Delaware State Museum, the Hall of Records, the John Dickinson Mansion, Delaware State College, the Octagonal Schoolhouse, and the Dover Heritage Trail Tours in Dover; Barratt's Chapel in Frederica; the Island Field Site and Archaeological Museum in Bowers Beach; Old Christ Church in Milford; Allee House, Lindens and Plank House, and the site of Duck Creek Village in Smyrna; and Bombay Hook National Wildlife Refuge, near Smyrna. This last attraction is listed in the "Outdoor Recreation Areas" section of the Resource Inventory.

Sussex County

Sussex County attractions reflect the county's geographic position, early historic significance, and present recreation function. Nearly 20 attractions are listed in the Resource Inventory, including the Zwaanendael Museum, the Lewes Historical Society Complex, and the Cape May-Lewes Ferry in Lewes; the Nature Center at Cape Henlopen State Park, near Lewes; the Boardwalk and amusement facilities, Convention Hall, and the Rehoboth Art League in Rehoboth Beach; the Fenwick Island Lighthouse; the Great Cypress Swamp and Woodland Ferry in Laurel; and a number of historic sites scattered through the county. The Zwaanendael Museum and the Lewes Historical Society Complex are listed in the AAA guide.

Historic Places

The Resource Inventory includes a map showing the locations of 18 historic and cultural attractions. All except the Lowber House in Magnolia are administered by the Delaware Division of Historical and Cultural Affairs. The Resource Inventory also includes a comprehensive list of over 200 historic sites in Delaware which appear on the National Register of Historic Places. Slightly over half of these sites are in New Castle County; the other half are split between Kent and Sussex Counties. National Register sites included in the Attractions section of the Resource Inventory are identified by an "H" footnote.

Events

The schedule of annual events listed in the Resource Inventory shows wide variety with good seasonal and locational distribution.

In New Castle County, many events occur in spring and fall when weather is best.

There are several notable exceptions of special interest to tourists, however, such as special Christmas events as Odessa, Hagley Museum and Longwood Gardens; the illuminated fountain displays at Longwood Gardens throughout the summer months; special seasonal tours at Winterthur; and thoroughbred and harness racing at Brandywine Raceway and Delaware Park. There is also a year-round cultural season, with summertime outdoor plays and concerts supplementing the schedule of indoor presentations by the Newark Symphony Orchestra and at Wilmington's Grand Opera House.

Kent County events with good capacity to attract tourists include the mid-summer Delaware State Fair in Harrington; auto, thoroughbred and harness racing at Dover Downs and Harrington Raceway at various times throughout the year; an open house at Dover Air Force Base; and a series of special celebrations scheduled in Milford, Dover, and Bowers Beach.

In Sussex County, the schedule of events indicates that imaginative attempts have been made to entice visitors in the shoulder and off-seasons. There is a marathon in November, a Christmas house tour, a Good Friday Kite Festival at Cape Henlopen State Park, several festival days in May, and a sidewalk sale in November.

Outdoor Recreation

The 1979 Statewide Comprehensive Outdoor Recreation Plan[1] shows a grand total of 95,506 acres of Delaware parks and preserves available for outdoor recreation use. Of the total, approximately 37 percent (35,500 acres) is in Kent County, 35 percent (33,200 acres) in New Castle County, and 28 percent (26,700 acres) in Sussex County.

The vast majority (89 percent) of outdoor recreation areage is publicly owned. The Federal government has established three National Wildlife Refuges (Kilcohook, Bombay Hook and Primehook) on the shores of the Delaware Bay and there are national recreation lands along both sides of the Chesapeake and Delaware Canal. In total, federal parks and preserves cover nearly 35,000 acres. The State manages 10 State parks encompassing 8,936 acres and seven State forests covering 6,385 acres. There are also 50 fish and wildlife areas, with a grand total of over 25,000 acres. Additionally, there are hundreds of outdoor recreation areas controlled by municipal governments (primarily playgrounds) and the private sector (swimming pools, golf courses, marinas, etc.). There are also 13 Wayside Rest Areas along Delaware highways and one major Roadside Rest Area, which includes picnic tables and other facilities. Maps spotting the locations of these publicly owned facilities are included in the Resource Inventory.

The SCORP identified bicycle trails as one of the ten major deficits in outdoor recreation resources. Although there are now only five miles of officially designated bicycle trails in Delaware, an extensive network of primary and secondary bicycle corridors along which hostels could be located has been mapped out for further study. These corridors traverse the State from north to south and east to west, and would connect in with existing Pennsylvania and Cape May/New Jersey bikeways. Delaware's flat terrain is an asset for pleasure bicycling.

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1 Ibid.

Most private holdings for outdoor recreation are relatively small facilities for a specific activity or combination of activities, such as golf, tennis, camping, and marine and equestrian sports. Two non-profit conservation groups are important exceptions. Delaware Wildlands owns over 21,000 acres that are primarily in Sussex County and include the Cypress Swamp mentioned above. Woodlawn Trustees owns 2,000 acres along Brandywine Creek in New Castle County.

Outdoor recreation activities of most importance to tourists include swimming, hunting and gunning, and fishing and boating in the ocean, bays and ponds. According to the SCORP, statewide totals for water-based recreation include:

1. 4,243 acres for fishing and boating access

2. 93 boat ramps and 2,492 boat slips

3. 176,378 linear feet of fishing piers and 90,350 linear feet of swimming shoreline

4. 61 swimming pools with a total of 313,242 square feet of swimming area

A directory of marine facilities and services in Delaware, prepared by the Delaware Sea Grant Marine Advisory Service (see Appendix A, Section III-G), lists 43 marine business operations. These include three in New Castle County north of the C&D Canal, two between Port Penn and Woodland Beach, ten in the Bowers Beach/Milford area, nine in the Lewes area, and 19 in the Delaware shore area south of Lewes.

Hunting and gunning resources consist of 42,784 designated acres, almost all publicly owned. About half of the hunting and gunning acreage is in Kent County, about 30 percent in New Castle County, and about 20 percent in Sussex County.

Support Facilities

Campgrounds

The vast majority of campgrounds and campsites in Delaware are located in the shore area of Sussex County. The SCORP outdoor recreation inventory shows 107 acres of undeveloped campground plus 4,342 developed campsites in Delaware. Of the developed campsites, 3,913 are in Sussex County, 222 in Kent County, and 207 in New Castle County. Only 859 are publicly owned. The undeveloped acreage, all publicly owned, is fairly evenly distributed among the three counties.

In that the SCORP inventory does not list the names and locations of campgrounds, the Delaware State Travel Service requested that the Resource Inventory include site specific detail to use for tourist referrals. Information was developed primarily from guidebooks and other secondary sources, supplemented as needed by telephone calls. Probably because of differences in methodology, the totals in the Resource Inventory are not identical to those in the SCORP. Proportions, however, are generally comparable. In the Resource Inventory, a total of 28 campgrounds were identified, of which 21 are operated by the private sector and seven by the public sector. All but six of the campgrounds are in Sussex County and most of those are near the shore. The Inventory lists 18 campgrounds in the Delaware shore area, containing over 3,800 campsites, or 85 percent of the 4,400 listed for the State.

Hotels and Motels

Table 1 presents a statistical summary of existing hotels and motels inventoried in Delaware. The list shows 130 facilities containing a grand total of just over 5,300 units.

New Castle County contains 30 percent (41) of the facilities and well over half (2,834) of the rooms. Four large Wilmington-Brandywine Hundred area hotels (the duPont, Brandywine Hilton, Sheraton-Brandywine, and Radisson Wilmington) in combination account for 872 rooms. Each of these hotels has facilities for accomodating sizeable group functions. The Radisson Wilmington Hotel can accomodate up to 1,400 for meetings and up to 900 for meals. Seven other medium sized and smaller facilities in the vicinity bring the total number of units in the Wilmington-Brandywine Hundred area to 1,300.

In addition, there are 16 hotels and motels in the City of New Castle, containing over 900 rooms; seven in Newark, containing about 525 rooms; and seven small facilities in other parts of the county containing about 100 rooms total.

For Kent County, 16 motels are listed, containing a grand total of just under 800 rooms. The overwhelming majority of these rooms (700) are in the nine Dover area facilities.

In Sussex County, most hotel and motel facilities are small. The nearly 1,700 rooms inventoried are scattered in 73 operations, indicating that the average facility has less than 25 rooms. Only three hotels or motels operating contain as many as 75 rooms. These are the Henlopen Hotel, the Atlantic Sands Motel, and the Commodore Motel, all in Rehoboth Beach.

Three of the facilities included in Table 1 are quite new. The 222-room Radisson Wilmington Hotel is a major complement to downtown Wilmington. A 44-room addition to Newark's 100-room Holiday Inn has recently been completed and the new 89-room Commodore Motel ranks among the largest facilities in Rehoboth Beach.

It should also be mentioned that the Radisson Wilmington and the Cove Resort Motel, Dewey Beach, each has an indoor swimming pool. At this time, no other Delaware hotel or motel has an indoor recreation facility of major importance, such as an ice rink, swimming pool, indoor tennis or racquetball courts, or the like. Such facilities can be important to tourism development if they are incorporated in the accomodations complex, conveniently accessible to the tourist, and free of complicated introduction requirements and scheduling arrangements. If year-round marketing of a resort-like environment is desired, development of additional indoor recreational facilities must be considered for the future.

Seasonal Housing

In the Delaware shore area, hotel and motel units are supplemented in peak season with a wide variety of rental units, including houses, cottages, apartments, and rooms. The 1970 Census of Housing[1] showed 5,222 dwelling units in the entire State of Delaware which were classified as non-farm "vacant - seasonal and migratory". By county, there were 4,980 units in Sussex, 205 in Kent

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1 Census of Housing, 1970, Bureau of Census, U.S. Department of Commerce.

TABLE 1: EXISTING HOTEL/MOTEL FACILITIES IN DELAWARE[1]

	Total		Under 75 Rooms		75-150 Rooms		Over 150 Rooms	
	Facilities	Units	Facilities	Units	Facilities	Units	Facilities	Units
New Castle County								
Wilm./Brandywine Hund.	11	1,300	4	702	3	326	4	872
New Castle	16	909	11	295	5	614	-	-
Newark	7	523	3	78	4	445	-	-
Other[2]	7	102	7	102	-	-	-	-
SUBTOTAL:	41	2,834	25	577	12	1,385	4	872
Kent County								
Dover	9	704	5	173	3	378	1	154
Other[3]	7	88	7	88	-	-	-	-
SUBTOTAL:	16	792	12	260	3	378	1	154
Sussex County								
Bethany Beach	7	193	7	192	-	-	-	-
Fenwick Island	6	176	6	176	-	-	-	-
Lewes	8	132	8	132	-	-	-	-
Rehoboth/Dewey	41	997	38	737	3	260	-	-
Other, Shore Area[4]	4	75	4	75	-	-	-	-
Other[5]	7	115	7	115	-	-	-	-
SUBTOTAL:	73	1,687	70	1,427	3	260	-	-
TOTAL:	130	5,313	107	2,264	18	2,023	5	1,026

1 All figures are approximate, and represent a summary of information presented in the Resource Inventory, Appendix A, Section IV-C. The few facilities for which the Inventory does not show number of units have been assumed to contain 15 units each. This estimate could be somewhat generous but is reasonable in relation to the overall size of smaller facilities in non-urban areas.

2 Includes 49 rooms in three motels in Bear, an estimated 38 rooms in three facilities in Odessa, and an estimated 15 rooms in one facility in Townsend.

3 Includes 23 rooms in three facilities in Felton, 45 rooms in two facilities in Milford, and 20 rooms in two facilities in Smyrna.

4 Includes 15 rooms in one facility in Georgetown, 57 rooms in two facilities in Millsboro, and three rooms in Ocean View.

5 Includes an estimated 60 rooms in four facilities in Laurel and 55 rooms in three facilities in Seaford.

and 37 in New Castle. Considering the boom in construction of condominiums and cottages for seasonal use that has occurred over the past decade, an estimate of 7,000 seasonal homes in Sussex County today would seem reasonably conservative.

Another base for estimating seasonal housing in Sussex County may be found in the number of transient rooms registered with the various shore area municipalities (Appendix A, Section IV-E). Nearly 1,600 transient units are registered in Bethany Beach, over 1,700 in Rehoboth Beach, about 500 in Lewes, and 125 in Fenwick Island, for a grand total of nearly 4,000 units in these four jurisdictions. Figures are not available for Dewey Beach, Indian River Inlet, Ocean View, South Bethany, or other unincorporated areas of Sussex County. Allowing for both these omissions and the fact that some owners do not rent their seasonal homes, it again seems reasonable to estimate that the Sussex shore area has approximately 7,000 seasonal homes, condominiums, apartments and other units available on a rental basis to supplement the commercial accomodations plant.

Other

The Resource Inventory also contains detailed listings of other facilities and organizations which support Delaware's tourist business, including restaurants, shopping facilities of interest to tourists (antique dealers, factory outlets, shopping malls), and arts, cultural and civic groups.

In these categories, which service resident population as well as tourism, development is especially concentrated in urbanized New Castle County. However, each of the three counties has a good range of restaurants, other commercial facilities and support groups to service tourism. It should be mentioned that Delaware has no general sales tax, a fact which makes shopping especially attractive to tourists. Reportedly, residents of neighboring states travel to Delaware in significant numbers for the specific purpose of shopping.

SUMMARY

Delaware's small size and geographic proximity to major market areas in the northeastern megalopolis are strong assets for tourism promotion. Overall, Delaware's resource base shows good range and variety, with particular strengths in facilities for water-based recreation and attractions of historic and cultural significance.

Each of Delaware's three counties presents a distinct personality, reflecting differences in orientation, degree of development, and resource base characteristics. Strengths and weaknesses perceived in the preceding analysis are summarized below for each county. "Strengths" are defined as promotable characteristics, and "weaknesses" as correctable characteristics.

New Castle County

New Castle County is generally characterized by high population density, concentrated transportation arteries, and an attractive rolling landscape. Physically similar to areas in nearby Pennsylvania, it is part of the eastern megalopolis and contains Delaware's largest city, Wilmington. It is an urban region, in contract to the rural character of the other two counties in Delaware.

Strengths of New Castle County for tourism development include:

1. High quality cultural resources, including several museums of national significance.

2. A strong historical base, particularly in the Wilmington vicinity.

3. A good quality mix of hotel and motel accomodations, over 2,800 rooms in total.

4. Excellent facilities for banquets, meetings and other functions in four large hotels in the Wilmington area.

5. A comprehensive highway system.

6. Many fine restaurants.

7. A good base of commercial shopping areas throughout the county, supported in part by out-of-state shoppers attracted by the lack of sales tax in Delaware.

8. A good mix of outdoor recreation facilities, particularly for general outings and sightseeing.

9. The University of Delaware, based in Newark.

Weaknesses include:

1. Fragmentation of the tourism plant. The cultural resources and hotel accomodations of the county are scattered, rather than concentrated.

2. Lack of a single unifying commercial attraction, such as a theme park.

3. No major convention center serving all area hotels.

Kent County

Kent County is characterized by the flat, rich agricultural landscape of the Eastern Shore. Dover, the State capital, is the main urban area.

Tourism strengths in Kent County include:

1. The capitol buildings and museums in Dover -- a small-scale combination of attractions of excellent merit.

2. Delaware Bay, extensive coastal wetlands (particularly in and near the Bombay Hook National Wildlife Refuge) and related scenic rivers.

3. Great fishing and hunting in season.

4. Beaches and marinas on Delaware Bay.

5. Fairgrounds and raceways.

6. A good motel plant in Dover (about 700 rooms); several motels in Milford, Felton and Smyrna.

7. A good north-south highway system, particularly U.S. Routes 13 and 113.

8. Scenic Delaware Route 9 linking the wetland areas.

Weaknesses to be considered include:

1. A flat rural topography lacking exceptional points of interest -- similar to counterpart areas in the Eastern Shore of Maryland and Virginia.

2. No single outstanding cultural or natural attraction; no unifying theme.

3. Only one State park.

4. No multi-lane east-west highways to provide access to the county from the Baltimore-Washington metropolitan area.

Sussex County

Sussex County, like Kent County, is generally characterized by flat agricultural terrain typical of the Eastern Shore. In the east, however, there are fine Atlantic beaches and bays that represent Delaware's outstanding tourism asset.

Strengths of Sussex County include:

1. An excellent variety of opportunities for swimming, boating and fishing.

2. Extensive State parklands, encompassing prime coastline as well as inland areas.

3. The complementary coastal resources of Rehoboth, Indian River and Little Assawoman Bays and adjacent land areas, which are still relatively undeveloped.

4. The relatively low density tourism plant that has been developed along and near the Atlantic Ocean in Delaware, encompassing a good variety of campgrounds (about 3,800 campsites), hotels and motels (over 1,500 units), and seasonal homes and apartments (estimated at 7,000).

5. A convention hall in Rehoboth Beach and a motel with a new indoor pool which will buttress existing facilities for accomodating group business.

6. A good coastal highway, Delaware Highway 1.

7. A community (Rehoboth) that is financially healthy.

Weakness to be considered are:

1. A road system inadequate to avoid increasing traffic congestion during the tourist season.

2. Strong seasonality in operation of supporting commercial facilities, including shops, restaurants and accomodations.

Moving from resources to markets, the following discussion will delve into the characteristics of visitors to Delaware. The first section will deal with statistics covering all travel to the State; the second section will concentrate on the patterns of particular market segments.

VOLUME AND CHARACTERISTICS OF ALL TRAVEL TO DELAWARE

Figures for the 1977 National Travel Survey, conducted by the Bureau of the Census, U.S. Department of Commerce, have just recently been released for selected characteristics of the U.S. population on trips of 100 miles or more from home for business or pleasure.

As stated by the Bureau of the Census:

> "The 1977 National Travel Survey is based on information collected from a sample of some 25,000 households chosen to represent the total non-institutional, civilian population of the United States. Part of the 1977 Census of Transportation, the survey was sponsored jointly by the Census Bureau, the U.S. Department of Transportation, and the U.S. Travel Service.
>
> "As in all sample surveys, the data are subject to sampling variability and errors of response and caution should be used in making comparisons of estimates."

Particular caution should be exercised in making comparisons between the 1972 and 1977 surveys in that methodologies were not entirely parallel. However, the upward trend is apparent. On an national basis, the 1977 survey showed that American households took 312.5 million trips of 100 miles or more away from home in 1977, or some 32 percent more than did American households in 1972 (Table 2). The number of person-trips increased by 18 percent from 458 million in 1972 to 539 million in 1977. Person-nights were up by 21.5 percent from 1.78 billion in 1972 to 2.16 billion in 1977. The average number of person-nights per person-trip was up very slightly from 3.89 nights in 1972 to 4.01 in 1977.

The 2,165,000 person-trips to destinations in Delaware accounted for less than one-half of one percent of all U.S. travel, but represented a 58 percent increase over 1972 (refer again to Table 2). Person-nights on trips to Delaware destinations were up by an impressive 74 percent. Despite the large increase, person-nights per person-trip were still below the national average.

The 1977 National Travel Survey also identified 329,000 person-trips where a night was spent in Delaware on a trip destined to another state, up 65 percent from 1972. These trips represented 463,000 person-nights, or 1.41 nights per person-trip, a figure which is down significantly from the 1972 level.

Summarizing, figures in Table 2 indicate that travel to Delaware destinations on trips of 100 miles or more has been increasing much faster than the national average. Although volume may seem small in relation to totals for the nation, travel to Delaware is reasonably proportionate to the State's physical size and population.

The major categories of travel to and through Delaware in 1977 are presented in Table 3. In total, there were 6.4 million household trips and 12.2 million person-trips of 100 miles or more to and through Delaware. However, 80 percent simply passed through the State. Of the remaining 20 percent, about 17.5 percent were headed for Delaware destinations (1,114,000 household trips and 2,165,000 person-trips) and 2.5 percent spent a night in Delaware on the way to another state. Person-nights in Delaware were projected at 7,940,000 in total. As would be expected for a small-sized state, most trips of 100 miles or more to Delaware destinations originated outside Delaware.

The three columns of Table 4 compare selected trip characteristics of (1) travel to Delaware destinations with (2) all travel to and through Delaware, and (3) all travel by U.S. households. Of particular note among these comparisons are the following:

Transportation. Ninety percent of the person-trips to Delaware destinations were taken by automobile or truck without camping equipment, and only two percent by airplane. Comparable proportions for the U.S. traveling public as a whole were, respectively, 76 and 12 percent.

Main Purpose of Trip. Outdoor recreation was the main purpose of 53 percent of the person-trips to Delaware destinations, as compared to the national average of only 13 percent. On the other hand, the main purpose of a trip to Delaware as compared with the national average was far less likely to be for visiting friends and relatives (23 percent for Delaware vs. 37 percent nationally), for business/convention reasons (nine percent for Delaware vs. 20 percent nationally), or for sightseeing (only one percent for destinations in Delaware vs. five percent nationally and eight percent for all travel to and through Delaware).

Weekend/Vacation. Trips to Delaware destinations were more likely than average to be weekend trips (57 percent for Delaware vs. 41 percent nationally) and more likely to be vacation trips (46 percent of Delaware vs. 37 percent nationally).

Round Trip Distance. Over half of the trips to Delaware destinations were less than 300 miles round trip, and 88 percent were less than 400 miles round trip. Comparable figures for the nation as a whole were 34 percent and 51 percent, respectively. It should be mentioned that trips in densely populated regions, such as the Northeast, tend to be much shorter than those in the more open areas of the Midwest and West.

Duration of Trip. Well over half (57 percent) of the trips to Delaware destinations were for two or three nights, as compared with 36 percent nationally, a proportion which seems consistent with the high percentage of weekend travel to Delaware. National figures show higher percentages for both longer and shorter trips.

Region of Origin. Three-quarters of the trips to Delaware destinations originated in the George Washington Country Region (Pennsylvania, Maryland, Virginia and the District of Columbia), about 18 percent originated in the Eastern Gateway Region (New Jersey and New York), and 7.6 percent originated in Delaware itself. No other region accounted for as much as three percent of the trips to destinations in Delaware. In contrast to figures

TABLE 2: TRAVEL BY U.S. HOUSEHOLDS

ON TRIPS OF 100 MILES OF MORE AWAY FROM HOME, 1972 AND 1977

	1972	1977	Percent Change
All U.S. Travel			
Household trips (000)	236,939	312,532	+31.9
Person-trips (000)	458,483	539,289	+17.6
Person-nights (000)	1,781,900	2,164,362	+21.5
Person-nights per person-trip	3.89	4.01	+ 3.1
Trips to Destinations in Delaware			
Person-trips (000)	1,373	2,165	+57.7
Person-nights (000)	4,308	7,477	+73.6
Person-nights per person-trip	3.14	3.45	+ 9.9
Spent Night in Delaware on Trip Destined for Another State			
Person-trips (000)	199	329	+65.3
Person-nights (000)	444	463	+ 4.3
Person-nights per person-trip	2.23	1.41	-36.8

Sources: 1972 National Travel Survey and 1977 National Travel Survey, Bureau of Census, U.S. Department of Commerce.

TABLE 3: TRIPS OF 100 MILES OR MORE TO AND THROUGH DELAWARE, 1977

	Household Trips		Person-trips		Person-nights in Delaware	
	Number (000)	Percent	Number (000)	Percent	Number (000)	Percent
All Travel to and through Delaware	6,437	100.0	12,232	100.0	7,940	100.0
Trips to Delaware Destinations	1,114	17.3	2,165	17.7	7,477	94.2
Originated in Delaware	116	1.8	168	1.4	Not Available	
Originated in Another State	998	15.5	1,997	16.3	Not Available	
Trips to other Destinations						
Spent Night in Delaware	158	2.5	329	2.7	463	5.8
Passed Through	5,166	80.3	9,737	79.6	Not Applicable	

Source: 1977 National Travel Survey, Bureau of Census, U.S. Department of Commerce.

TABLE 4: SELECTED TRIP CHARACTERISTICS

TRAVEL TO DELAWARE DESTINATIONS COMPARED WITH ALL TRAVEL TO AND THROUGH DELAWARE AND ALL TRAVEL BY U.S. HOUSEHOLDS

Characteristic	Trips to Delaware Destinations		All Travel To and Through Delaware		All Travel by U.S. Households	
	Person-Trips (000)	Percent	Person-Trips (000)	Percent	Person-Trips (000)	Percent
Total	2,165	100.0	12,232	100.0	539,289	100.0
Transportation						
Auto/Truck w/o Camp	1,949	90.0	10,817	88.4	411,023	76.2
Auto/Truck w/Camp Eq	43	2.0	721	5.9	30,983	5.7
Bus	8	0.4	23	0.2	14,959	2.8
Train	73	3.4	87	0.7	4,094	0.8
Airplane	35	1.6	67	0.5	65,662	12.2
Other	0	-	3	*	3,724	0.7
Combinations	58	2.7	514	4.2	8,844	1.6
Main Purpose						
Visit Rel/Friends	489	22.6	4,774	39.0	198,479	36.8
Business	175	8.1	1,274	10.4	94,800	17.6
Convention	16	0.7	143	1.2	10,604	2.0
Outdoor Recreation	1,144	52.8	2,184	17.9	70,610	13.1
Entertainment	92	4.2	847	6.9	41,790	7.7
Sightseeing	24	1.1	1,024	8.4	28,237	5.2
Personal/Fam Aff/Med	198	9.1	1,415	11.6	67,164	12.5
Shopping	0	-	25	0.2	3,665	0.7
Other	26	1.2	546	4.5	23,940	4.4
Weekend or Other Trip						
Weekend	1,239	57.2	4,838	39.6	218,465	40.5
Not a Weekend	911	42.1	7,256	59.3	314,691	58.4
Not Reported	15	0.7	137	1.1	6,134	1.1
Vacation or Other Trip						
Vacation	998	46.1	6,839	55.9	199,631	37.0
Not a Vacation	1,167	53.9	5,364	43.9	335,692	62.2
Not Reported	0	-	29	0.2	3,967	0.7
Round Trip Distance						
200-299 Miles	1,125	52.0	2,806	22.9	183,303	34.0
300-399 Miles	768	35.5	1,671	13.7	88,996	16.6
400-599 Miles	102	4.7	2,509	20.5	94,004	17.4
600-799 Miles	92	4.2	1,184	9.7	40,634	7.5
800-999 Miles	20	0.9	729	6.0	24,120	4.5
1,000-1,999 Miles	29	1.4	1,694	13.8	47,643	8.8
2,000 Miles and Over	29	1.4	1,540	12.6	42,728	7.9
Outside U.S.	0	-	98	0.8	17,862	3.3
Median Distance	295		526		386	

* Less than 0.05 percent

TABLE 4 (Continued)

Characteristic	Trips to Delaware Destinations: Person-Trips (000)	Trips to Delaware Destinations: Percent	All Travel To and Through Delaware: Person-Trips (000)	All Travel To and Through Delaware: Percent	All Travel by U.S. Households: Person-Trips (000)	All Travel by U.S. Households: Percent
Duration of Trip						
No Nights	327	15.1	1,233	10.1	100,844	18.7
1 Night	170	7.9	1,241	10.1	89,075	16.5
2-3 Nights	1,234	57.0	4,316	35.3	192,925	35.8
4-9 Nights	265	12.2	3,519	28.8	108,356	20.1
10-15 Nights	37	1.7	1,038	8.5	27,858	5.2
16 Nights or More	133	6.1	887	7.3	20,232	3.8
Median Duration		2.9		3.6		2.6
Region of Origin						
New England	63	2.9	833	6.8	23,472	4.4
Eastern Gateway	394	18.2	3,901	31.9	44,363	8.2
George Washington	1,632	75.4	6,635	54.2	53,263	9.9
South	33	1.5	595	4.9	96,608	17.9
Great Lakes Country	15	0.7	140	1.1	127,679	23.7
Mountain West	0	-	0	-	28,854	5.4
Frontier West	21	1.0	67	0.5	79,905	14.8
Far West/Hawaii	7	0.3	61	0.5	85,146	15.8
Began in this State	168	7.6	995	8.1	-	-
Number on Trip						
1 Person	579	26.7	3,291	26.9	186,400	34.6
2 Persons	583	26.9	3,857	31.5	164,400	30.5
3 Persons	139	6.4	1,414	11.6	65,434	12.1
4 Persons	641	29.6	2,204	18.6	71,937	13.3
5 Persons or More	223	10.3	1,465	12.0	51,118	9.5
Mean Number on Trip		2.8		2.6		2.4

Note: Percentages may not add precisely because of rounding.
Source: 1977 National Travel Survey, Bureau of Census, U.S. Department of Commerce.

for those traveling to destinations in Delaware, figures for all travel to and through Delaware show that many more (32 percent, up from 18 percent) came from the Eastern Gateway and only 54 percent (down from over 75 percent) came from George Washington Country. Differences are smaller, but still significant, for trips originating in New England and the South.

Number of Persons on Trip. The average number of persons on trips to Delaware destinations (2.8 persons per trip) is slightly higher than the national average (2.4 persons per trip), but the difference is not meaningful.

Summarizing, trips to Delaware destinations were taken primarily by car for outdoor recreation purposes. Almost all trips originated less than 200 miles away

TABLE 5: SELECTED TRAVELER CHARACTERISTICS

TRAVEL TO DELAWARE DESTINATIONS COMPARED WITH ALL TRAVEL TO AND THROUGH DELAWARE AND ALL TRAVEL BY U.S. HOUSEHOLDS

Characteristic	Trips to Delaware Destinations		All Travel To and Through Delaware		All Travel by U.S. Households	
	Person-Trips (000)	Percent	Person-Trips (000)	Percent	Person-Trips (000)	Percent
Total	2,165	100.0	12,232	100.0	523,289	100.0
Family Income						
Under $5,000	146	6.7	555	4.5	35,218	6.5
$5,000-7,499	29	1.3	594	4.9	32,714	6.1
$7,500-9,999	313	14.5	1,082	8.8	33,205	6.2
$10,000-14,999	461	21.3	2,118	17.3	111,373	20.7
$15,000-19,999	118	5.5	1,738	14.2	101,586	18.8
$20,000-24,999	539	24.9	2,332	19.1	85,366	15.8
$25,000-49,999	521	24.1	3,233	26.4	120,813	22.4
$50,000 or More	39	1.8	579	4.7	19,014	3.5
Median Family Income	$20,148		$20,060		$17,811	
Occupation						
Employed	1,845	85.2	10,161	83.1		
White-Collar	1,130	52.2	6,954	56.9		
Prof. and Tech.	405	18.7	3,022	24.7		
Mgr./Admin. Not Farm	500	23.1	2,418	19.8		
Sales	175	8.1	955	7.8		
Clerical	49	2.3	559	4.6	Not Available	
Blue-Collar	212	9.8	2,125	17.4		
Craft and Kindred	119	5.5	1,155	9.4		
Operatives	93	4.2	869	7.1		
Nonfarm Laborers	0	-	101	0.8		
Service Workers	497	23.0	1,062	8.7		
Farm Workers	6	0.3	21	0.2		
Unemployed/Not in L.F.	320	14.8	2,070	16.9		
Retired	103	4.8	723	5.9		
Other	217	10.0	1,347	11.0		
Household Composition						
No Persons Under 18	558	25.9	4,672	38.2	323,753	60.0
With Persons Under 18	1,607	74.2	7,560	61.8	215,536	40.0
Age of Traveler						
Under 18	635	29.3	3,083	25.2	115,860	21.5
18-24	115	5.3	1,145	9.4	62,061	11.5
25-34	541	25.0	2,635	21.5	108,296	20.1
35-44	365	16.9	1,897	15.5	84,782	15.7
45-54	274	12.7	1,661	13.6	79,023	14.7
55-64	118	5.5	1,121	9.2	55,089	10.2
65 and Over	117	5.4	689	5.6	33,457	6.7
Median Age	31.6		31.2		32.5	

TABLE 5 (Continued)

Characteristic	Trips to Delaware Destinations: Person-Trips (000)	Trips to Delaware Destinations: Percent	All Travel To and Through Delaware: Person-Trips (000)	All Travel To and Through Delaware: Percent	All Travel by U.S. Households: Person-Trips (000)	All Travel by U.S. Households: Percent
Education of Traveler						
Elementary or Less	646	29.8	3,072	25.1	124,748	23.1
High School	764	35.3	4,196	34.3	204,685	38.0
College	754	34.8	4,964	40.6	209,856	38.9
Sex of Traveler						
Male	1,215	56.1	6,466	52.9	295,768	54.8
Female	950	43.9	5,765	47.1	243,521	45.2
Race of Traveler						
White	2,083	96.2	10,527	86.1	505,491	93.7
Black or Other	82	3.8	1,704	13.9	33,798	6.3
Area of Residence						
SMSA Under 1 Million	959	44.3	2,969	24.3	171,501	31.8
SMSA 1 Million or Over	969	44.8	7,326	59.9	204,578	37.8
Not in SMSA	237	10.9	1,936	15.8	163,210	30.3

Source: 1977 National Travel Survey, Bureau of Census, U.S. Department of Commerce.

from Delaware, and the majority were weekend trips (two to three nights) originating in George Washington Country.

Tabulation of traveler characteristics given in Table 5 show few significant variations from the trip characteristics given above. Median family income of travelers to Delaware destinations ($20,150) is higher than the average for all U.S. travelers ($17,800) but is about the same as the median family income for all travelers to and through Delaware ($20,060). The high proportion of "service workers" taking trips to Delaware destinations would seem to relate to the high concentration of government employees in the Baltimore-Washington metropolitan area.

Statistics on household composition show a very high proportion (74 percent) of persons under 18 taking trips to Delaware destinations, as compared with a national average of 40 percent. This would seem to indicate that trips to Delaware are usually family outings.

In the remaining categories (age, education, sex, race and area of residence), travelers to Delaware destinations appear to be very much like their counterparts throughout the nation.

TABLE 6

DELAWARE MEMORIAL BRIDGE TRAFFIC

BY MONTH - 1977

Month	Passenger Cars		Trucks and Special Permit Vehicles		Non-Revenue Vehicles		Commutation Tickets		Tickets		Total	
	Number (000)	Pct.	Number (000)	Pct.	Number (000)	Pct.	Number (000)	Pct.	Number (000)	Pct.	Number (000)	Pct.
January	744	5.7	238	7.0	2	7.8	119	7.7	23	6.7	1,127	6.1
February	780	6.0	237	7.0	2	7.7	117	7.5	25	7.4	1,164	6.3
March	901	6.9	295	8.7	3	9.4	139	8.9	30	8.8	1,368	7.4
April	1,139	8.7	288	8.5	2	8.2	129	8.2	29	8.6	1,587	8.6
May	1,155	8.8	295	8.7	2	8.6	133	8.5	30	8.9	1,616	8.8
June	1,138	8.7	317	9.3	2	8.7	133	8.5	30	8.7	1,620	8.8
July	1,543	11.8	303	8.9	2	8.6	120	7.7	30	8.7	1,998	10.9
August	1,513	11.6	322	9.5	2	8.9	129	8.3	31	9.1	1,998	10.9
September	1,123	8.6	288	8.5	2	7.7	134	8.6	28	8.2	1,574	8.6
October	1,010	7.7	287	8.4	2	8.9	141	9.0	29	8.5	1,469	8.0
November	1,007	7.7	268	7.9	2	8.1	136	8.7	27	8.0	1,441	7.8
December	1,017	7.8	260	7.7	2	7.4	129	8.3	29	8.4	1,437	7.8
TOTAL	13,072	100.0	3,400	100.0	28	100.0	1,559	100.0	342	100.0	18,401	100.0
Average Per Day	35,813		9,317		75		4,272		938		50,415	

Source: Delaware River and Bay Authority

VOLUME AND CHARACTERISTICS OF MARKET SEGMENTS

Delaware River and Bay Crossings

Statistics for the Delaware Memorial Bridge show the volume and seasonality of traffic passing into and through New Castle County (Table 6). On a year-round basis, total volume averaged over 50,000 vehicles per day in 1977.[1] By revenue classification, daily traffic averaged about 35,800 passenger cars, 9,300 special permit vehicles and trucks, 75 non-revenue vehicles, 4,300 commutation tickets, and 940 shoppers tickets.

Seasonally, passenger car volume peaks sharply in July and August. In each of these two months, over 1.5 million cars cross the Delaware Memorial Bridge, or nearly 12 percent of the annual traffic volume. In contrast, monthly traffic in January and February is in the 750,000 range, or only about half of that in July and August. In other months, volume is consistently between 900,000 and 1,100,000 vehicles. Only passenger car statistics show the strong July-August peaking. Volume for the other revenue classifications is fairly consistent throughout the year.

TABLE 7: CAPE MAY-LEWES FERRY

REVENUE PASSENGERS AND VEHICLES, BY MONTH - 1977

	Passengers		Bus Passengers		Vehicles	
Month	Number	Percent	Number	Percent	Number	Percent
January	2,723	0.5			1,220	0.7
February	1,915	0.3			751	0.4
March	14,558	2.5			6,433	3.6
April	31,429	5.5	276	2.9	11,669	6.6
May	38,416	6.7	978	10.4	14,697	8.3
June	79,362	13.9	2,251	24.0	20,521	11.6
July	136,806	23.9	2,407	25.7	37,428	21.1
August	143,221	25.0	2,039	21.8	40,387	22.8
September	69,767	12.2	978	10.4	21,336	12.0
October	26,306	4.6	226	2.4	10,848	6.1
November	16,586	2.9	78	0.8	6,923	3.9
December	11,031	1.9	137	1.5	4,941	2.8
TOTAL	572,120	100.0	9,370	100.0	177,154	100.0

Source: Delaware River and Bay Authority

On the Cape May-Lewes Ferry crossing, passenger and vehicular traffic is extremely seasonal, as shown in Table 7. July and August are the top months, each representing 20-25 percent of the yearly totals. June and September are also quite good, with 11-13 percent each. Volume averages fall sharply in the

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1 Although the 1978 Annual Report of the Delaware River and Bay Authority has not yet been released, individual monthly reports of total volume indicate traffic patterns for both the Delaware Memorial Bridge and the Cape May-Lewes Ferry are comparable to those for 1977.

spring and fall, and traffic drops to very low levels in the months of January and February.

Brandywine Valley

Attendance patterns at the Brandywine Valley's leading attractions are illustrated in Table 8. Longwood Gardens, situated in nearby Pennsylvania, recorded nearly 650,000 visits in 1978. Seasonally, the most popular time to visit the gardens is in the spring when blossoming trees, shrubs and flowers are at their height. The combined attendance of April and May, about 157,000 visits, accounted for 24 percent of Longwood's total 1978 attendance. June, July, August, and December also showed higher than average visitation figures, reflecting the popularity of special events in the summer (illuminated fountain displays) and at Christmas.

The Henry Francis du Pont Winterthur Museum and Gardens are open during all seasons of the year for tours of the gardens, the George and Martha Washington Wing and, with advance reservations, the major portion of the main museum. Special seasonal events include the Winterthur Country Fair (which, in 1978, was held on a Sunday in September) and tours of the H.F. du Pont House (which is open only during the month of October). The months during which these special events occurred in combination accounted for about 65 percent of Winterthur's total 1978 attendance of 182,000.

At the Brandywine River Museum, the 1978 seasonal peak in attendance occurred in December, when special events attracted an extraordinary 24 percent of the annual total. Attendance here was also higher than average in May. Located in neighboring Pennsylvania at Chadds Ford, the Brandywine River Museum features the works of Andrew Wyeth and other American artists. In that exhibits are indoors, attendance is not significantly affected by weather.

At the Hagley Museum, an indoor and outdoor museum along the Brandywine River in Wilmington, the best months for attendance in 1978 were April, May and June when the weather is delightful in Wilmington, and December, when candlelight tours are held.

Recent surveys conducted at Winterthur and Longwood Gardens included several questions directed to defining visitor characteristics. Results of these surveys are summarized in Table 9.

At Winterthur, an exceptionally high proportion of the visitors are women (70-75 percent); about two-thirds are in "middle" age groups (35-64); about half have a family income of $25,000 or more; and 70 percent have been educated at the college level or higher. About six percent of Winterthur's visitors are from the home State of Delaware, 22 percent from Pennsylvania, 37 percent from other nearby states (New York, New Jersey, Maryland and Virginia), and 35 percent from all other states. All of these characteristics, excepting residence, are in sharp contrast to visitor characteristics identified in the National Travel Survey for all visitors traveling 100 miles or more to Delaware destinations.

Visitor surveys at Longwood Gardens show patterns somewhat more comparable to those in the National Travel Survey. There is a more even distribution of men and women visitors, although women predominate here also. A high proportion

TABLE 8: MONTHLY DISTRIBUTION OF ATTENDANCE AT SELECTED BRANDYWINE VALLEY ATTRACTIONS, 1978

Month	Longwood Gardens		Winterthur		Brandywine River Museum		Hagley Museum	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
January	9,654	1.5	2,060	1.1	7,857	6.3	1,209	1.6
February	12,807	2.0	2,321	1.3	3,649	2.9	1,455	1.9
March	36,282	5.6	5,671	3.1	6,170	4.9	3,307	4.3
April	68,947	10.6	20,361	11.2	9,821	7.9	7,911	10.4
May	87,809	13.5	47,865	26.3	11,899	9.5	12,705	16.7
June	75,249	11.6	11,439	6.3	8,260	6.6	8,441	11.1
July	81,055	12.5	9,937	5.5	9,627	7.7	6,734	8.8
August	67,303	10.4	10,108	5.6	9,225	7.4	6,617	8.7
September	50,675	7.8	21,474	11.8	8,961	7.2	5,276	6.9
October	48,784	7.5	29,231	16.1	10,083	8.1	7,181	9.4
November	28,835	4.4	6,974	3.8	9,994	8.0	6,374	8.4
December	80,746	12.5	14,181	7.8	29,284	23.5	8,883	11.7
TOTAL	648,056	100.0	181,662	100.0	124,830	100.0	76,093	100.0

Note: Attendance figures may not add precisely because of rounding.

Sources: Attendance figures were provided by the individual attractions.

TABLE 9: CHARACTERISTICS OF VISITORS TO WINTERTHUR AND LONGWOOD GARDENS

Characteristics	Winterthur[1] October 1978 Percent	Winterthur[1] May 1978 Percent	Longwood Summer 1974[2] Percent	Longwood June 1978[3] Percent
Sex				
Male	26	31	46	43
Female	75	69	55	58
Age				
Under 35	16	20	60	42
35-64	68	61	34	51
65 or Over	16	20	4	6
No Answer	-	-	2	-
Occupation				
Student	5	8	-	-
Retired	24	28	-	-
Other	71	64	-	-
Family Income				
Under $10,000	10	7	-	11
$10,000-25,000	43	42	-	54
$25,000 and Over	47	52	-	27
Education				
High/Secondary School	20	15	32	31
Some or Junior College	10	10	22	21
College	38	38	17	16
Graduate School	25	31	23	22
Other	7	6	6	9
Residence				
Delaware	6	-	9	2
Maryland	9	-	9	10
New Jersey	11	-	11	12
New York	9	-	7	8
Pennsylvania	22	-	39	39
Virginia	8	-	3	2
Other	35	-	22	27

1 Fillos, Rita M. and Debra A., Visitor Profile and Opinion Survey, Parts I and II, The Henry Francis du Pont Winterthur Museum, 1978.

2 Randall, Colvin L., Longwood Gardens Visitor Survey, Longwood Program in Ornamental Horticulture, University of Delaware, June 1975.

3 Patterson, Karla Sue, Longwood Gardens: A Visitor Study, a thesis submitted to the Faculty of the University of Delaware for the Master of Science Degree in Ornamental Horticulture, June 1978.

of visitors are under 35 years of age (40-60 percent); over half have family incomes in the $10,000-25,000 range; and about half attended college or graduate school. About 40 percent of Longwood's visitors are from Pennsylvania, 35-40 percent from other neighboring states (including Delaware), and 20-25 percent from all other places.

It would appear that Winterthur and Longwood Gardens have a special attraction to certain market segments that are essentially complementary. Longwood's market appeal is broader, or less specific, than Winterthur's.

The Winterthur surveys also included questions on trip characteristics of the Museum's visitors (Table 10). For 86 percent of the visitors, sightseeing was their principal purpose for visiting the Wilmington area; only three percent reported business as their principal purpose. Over 40 percent of the visitors surveyed in the fall of 1977 came on an organized trip; slightly over one quarter came with family; and slightly over one quarter came with friends. Numbers were somewhat different for the survey conducted in May, 1978: more visitors came with families (44 percent) and fewer came on organized tours (30 percent) or with friends (24 percent). However, it is clear in both surveys that the organized tour is an important generator of visitation for Winterthur.

Concerning length of stay, roughly 40 percent of visitors in both the fall and spring reported spending more than one day in the Wilmington area. Of those,

TABLE 10: TRIP CHARACTERISTICS OF VISITORS TO WINTERTHUR

Characteristic	Percent of Visitors Surveyed October 1977	May 1978
Purpose of Visit to Wilmington Area		
Sightseeing	86	86
Business	3	3
Other	11	10
Travel Party		
Came Alone	3	2
Came with Family	27	44
Came with Friends	27	24
Came on Organized Tour	42	30
Spent More than One Day in Wilmington Area		
Yes	37	41
No	63	59
Where Stayed[1]		
Home	14	19
With Friends or Relatives	17	24
Hotel or Motel	66	56
Campground	3	1

1 If more than one day was spent in the Wilmington area.

Source: Fillos, Rita M. and Debra A., Visitor Profile and Opinion Survey, Parts I and II, The Henry Francis du Pont Winterthur Museum, 1978.

TABLE 11: DELAWARE STATE PARK ATTENDANCE BY MONTH - 1978

	Sussex County								Kent County	
	Cape Henlopen		Del. Seashore		Trap Pond		Holt's Landing		Killens Pond	
Month	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
January	9,900	1.8	1,960	0.2	725	0.7	605	0.7	604	1.0
February	9,460	1.8	4,435	0.4	356	0.4	512	0.6	562	0.9
March	14,170	2.6	18,542	1.5	2,293	2.2	729	0.9	815	1.3
April	20,700	3.9	29,980	2.4	5,938	5.7	1,099	1.3	3,082	4.8
May	33,560	6.3	109,709	8.7	8,010	7.6	1,940	2.3	7,397	11.6
June	83,380	15.5	141,932	11.2	16.679	15.9	11,273	13.3	12,671	19.8
July	142,600	26.6	408,354	32.3	31,186	29.7	27,350	32.1	13,416	21.0
August	119,900	22.4	362,106	28.7	20,960	20.0	28,775	33.8	10,795	16.9
September	43,800	8.2	152,815	12.1	10,980	10.5	10,012	11.8	5,661	8.8
October	26,100	4.9	26,894	2.1	5,820	5.5	1,421	1.7	5,361	8.4
November	17,050	3.2	5,406	0.4	1,610	1.5	804	0.9	2,793	4.4
December	15,500	2.9	885	0.1	467	0.4	553	0.6	812	1.3
TOTAL:	536,210	100.0	1,263,018	100.0	105,024	100.0	85,079	100.0	64,005	100.0

TABLE 11 (Continued)

	New Castle County									
	W.S. Carpenter		Brandywine Creek		Fort Delaware		Lums Pond		Bellevue	
Month	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
January	842	4.7	5,098	6.4	0	-	249	0.2	6,087	8.3
February	612	3.4	4,609	5.8	0	-	688	0.6	2,324	3.2
March	622	3.5	8,970	11.3	0	-	3,461	3.2	5,863	8.0
April	2,611	14.5	19,810	24.9	458	3.4	5,599	5.2	7,455	10.2
May	3,522	19.6	8,838	11.1	2,246	16.9	9,888	9.2	5,645	7.7
June	2,199	12.2	4,677	5.9	3,469	26.0	25,030	23.3	6,838	9.3
July	1,534	8.5	3,468	4.4	3,455	25.9	31,454	29.2	6,466	8.8
August	971	5.4	2,498	3.1	1,755	13.2	17,410	16.2	3,083	4.2
September	2,160	12.0	5,503	6.9	1,647	12.4	8,215	7.6	3,917	5.3
October	1,469	8.2	6,281	7.9	297	2.2	1,243	1.2	13,219	18.0
November	1,080	6.0	6,985	8.8	0	-	2,440	2.3	7,639	10.4
December	382	2.1	2,710	3.4	0	-	1,882	1.7	4,705	6.4
TOTAL:	18,004	100.0	79,447	100.0	13,327	100.0	107,559	100.0	73,241	100.0

Total Attendance (All State Parks): 2,344,914

Cape Henlopen and Delaware Seashore Attendance: 1,799,288 (76.7% of Total State Parks Attendance)

Source: Delaware Department of Natural Resources and Environmental Control, Division of Parks and Recreation

roughly 15-20 percent stayed at home (saying they lived in the Wilmington area), 20 percent stayed with friends and relatives, and 55-65 percented stayed at a hotel or motel. Applying the latter percentages to the proportions who reported staying overnight, it would appear that 23-24 percent of all visitors to Winterthur in the fall and spring stay in area hotels and motels.

State Parks

Total attendance at Delaware's State parks was 2,344,914 in calendar year 1978. A breakdown of attendance figures may be found in Table 11.[1] The 1,263,000 visits recorded at the Delaware Seashore State Park represented 54 percent of the grand total for all State parks and the 654,000 at Cape Henlopen accounted for 23 percent of the total. Together, these two coastal parks received just under two million visits, or 76.7 percent of the visits to all State parks in Delaware in 1978.

Monthly patterns at Cape Henlopen, Delaware Seashore, and Holt's Landing show the very strong July-August peaks which would be expected at oceanside parks. June is also a good month for attendance at these three parks; September, fair to good; and all other months, poor.

Trap Pond in Sussex County, Killens Pond in Kent County, and Lums Pond in New Castle County all show a very strong peaking in June, July and August within a season which runs from May through September. Attendance during the winter months is very poor. At Killens Pond, October is also a fairly strong month.

At the Walter S. Carpenter State Park in northwestern New Castle County, attendance is highest in April, May, June and October; at Brandywine Creek, in March, April and May; at Fort Delaware, in June, July and August; and at Bellevue, in April, October and November.

The above analysis clearly illustrates that the seashore is a summer place and inland pond areas are most attractive to their visitors in spring and summer. Other State parks in Delaware also attract most of their visitors in the spring and/or summer months.

Reported residence of Delaware State park users, as determined in a 1975 survey conducted by the Department of Natural Resources and Environmental Control, is summarized in Table 12. At the three seashore parks (Cape Henlopen, Delaware Seashore and Holt's Landing), only one-third of the visitors were from Delaware and most of the out-of-state visitors were from Maryland and Pennsylvania.

At Trap Pond, slightly over half of the visitors were from Delaware; about one-quarter from Maryland; and slightly less than one-quarter from all other places. At Lums Pond, about two-thirds were from Delaware; 17 percent from Pennsylvania; and the remainder from other states. At other State parks for which statistics are available (Killens Pond, Walter S. Carpenter and Brandywine Creek), Delawareans constituted the overwhelming majority of the visitors.

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1 Total attendance at Delaware State parks was down significantly in 1978, as compared with 1977 levels. Comparable figures for 1977 attendance were 3,650,000 for all parks; 653,000 for Cape Henlopen State Park; and 2,379,000 for Delaware Seashore State Park.

TABLE 12: REPORTED RESIDENCE OF DELAWARE STATE PARK USERS - 1975

Park	DE	PA	MD	NJ	VA	All Other
Sussex County						
Cape Henlopen	30.6%	34.3%	15.7%	1.4%	4.2%	13.8%
Delaware Seashore	34.1%	31.3%	19.5%	2.3%	3.9%	8.9%
Holt's Landing	34.1%	2.3%	45.5%	2.3%	4.5%	11.3%
Trap Pond	53.8%	6.7%	25.0%	5.8%	2.4%	6.3%
Kent County						
Killens Pond	83.9%	2.3%	1.1%	1.1%	3.4%	8.2%
New Castle County						
Walter S. Carpenter	86.0%	7.0%	4.7%	-	2.3%	-
Brandywine Creek	88.2%	2.7%	1.6%	1.1%	2.2%	4.2%
Lums Pond	67.5%	16.9%	3.6%	2.4%	2.4%	7.2%
Statewide	48.8%	21.3%	15.9%	2.4%	2.6%	9.0%

Source: Delaware's Statewide Comprehensive Outdoor Recreation Plan, Department of Natural Resources and Environmental Control, Division of Parks and Recreation, 1979.

TABLE 13: ORIGIN OF VISITORS

TOP TEN STATES AMONG VISITORS TO SELECTED KENT COUNTY ATTRACTIONS - 1977-78

State	Island Field		State Museum		State House	
	Number	Rank	Number	Rank	Number	Rank
Delaware	8,781	1	1,315	1	854	1
Maryland	1,005	2	141	2	189	3
Pennsylvania	638	3	138	3	245	2
New Jersey	283	4	112	4	110	4
New York	183	5	107	5	97	6
Virginia	108	6	59	7	107	5
California	0	-	48	8	89	7
Ohio	68	8	69	6	80	8
Florida	49	9	32	10	54	9
Illinois	0	-	0	-	46	10
Massachusetts	0	-	35	9	0	-
West Virginia	69	7	0	-	0	-
Michigan	48	10	0	-	0	-
Other U.S.	532	-	347	-	465	-
Foreign	79	-	65	-	76	-
Total Out-of-State	3,062	-	1,153	-	1,469	-
GRAND TOTAL:	11,843		2,468		2,323	
Breadth of Representation						
U.S. States	50		48		44	
U.S. Territories	1		2		1	
Other Countries	21		14		22	

Source: Compiled from information supplied by the individual attractions

Other Attractions

Additional insights on the origin and seasonality of visitors to Delaware are provided by tabulations of data provided by Delaware State museums and other individual attractions.[1] In New Castle County, visitors to the New Castle Courthouse during fiscal year 1978 represented 42 states, one U.S. territory and 31 foreign countries; to Buena Vista, 30 states, two territories and six foreign countries; and to the Hale-Byrnes House, 16 states and one foreign country.

Visitors to the John Dickinson Mansion in Dover during fiscal year 1978 represented 44 states, two territories and 22 foreign countries. The origin of visitors to three other popular attractions in Kent County are tabulated and ranked in Table 13. The breadth of representation at all three is excellent. The Island Field Museum received about 11,850 visitors representing 50 states and 21 foreign countries. The Delaware State Museum had about 2,500 visitors from 48 states and 14 foreign countries; the Old State House, about 2,300 visitors from 44 states and 22 foreign countries. For all three attractions, Delaware was the leading state of origin. The leading five out-of-state points of origin were Pennsylvania, Maryland, New Jersey, New York, and Virginia.

The seasonality of visitors to the Island Field Museum is tabulated in Table 14. The high months are May through August. Volume is above average in April and October; it is very low in the winter months of December, January and February.

The Southern Delaware Tourist Information Center in Milford, near the Kent-Sussex county border, registered visitors from 19 states and two foreign countries during the summer of 1978. Canadians represented ten percent of the Center's visitors during one summer month.

TABLE 14: MONTHLY DISTRIBUTION OF VISITS

ISLAND FIELD MUSEUM - FISCAL YEAR 1978

Month	Number	Percent
July	1,408	11.9
August	1,677	14.2
September	763	6.4
October	1,006	8.5
November	898	7.6
December	328	2.8
January	122	1.0
February	62	0.5
March	519	4.4
April	1,087	9.2
May	1,978	16.7
June	1,995	16.8
TOTAL:	11,843	100.0

Source: Island Field Museum

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1 Special thanks to Abbey Feierstein, Delaware Division of Historical and Cultural Affairs.

In lower Sussex County, the Zwaanendael Museum in Lewes registered visitors from 48 states, two U.S. territories and 41 foreign countries in fiscal year 1978. The Rehoboth Beach Chamber of Commerce reported that the leading states or areas producing mail and telephone inquiries in 1978 were Delaware, Pennsylvania, the District of Columbia, Maryland, Virginia, New York, West Virginia, Connecticut, New Jersey, and Canada. Inquiries also arrived from a wide variety of other states, particularly in the New England and North Central regions.

Hunting, Boating and Fishing

The Delaware Division of Fish and Wildlife issued 28,525 hunting licenses in fiscal year 1977, of which about 25,900 (91 percent) were issued to Delaware residents and 2,650 (nine percent) to non-residents. The Division estimated that the State's ten major wildlife areas provided more than 70,000 days of hunting recreation, and that hunters on all public and private lands accounted for a grand total of 550,000 recreation days in Delaware during 1977.[1]

The Division also conducted a special mail survey among owners of the 26,457 boats registered in Delaware in 1976.[2] The number of boat owners was estimated to be 25,815, allowing for those who register more than one boat. Results of the survey showed that 69 percent of the boats registered in Delaware are owned by Delawareans (about 17,800 people) and 31 percent of the boats are owned by out-of-staters (about 8,000 people).

Also from out-of-state were the 1,844 owners of boats registered in other states who purchased ramp certificates in order to launch their boats from ramps owned by the State of Delaware. Combining these figures, it may be deduced that about 9,500 boats owned by non-residents were used in Delaware waters in 1977. The survey determined that about 63 percent of both resident and non-resident owners of Delaware-registered boats participated in marine fishing.

To supplement its mail surveys of registered boaters, the Division of Fish and Wildlife used head counts from aerial surveys to determine the quantity and locational characteristics of recreational fishing in Delaware. From these surveys, the Division estimated that private boats and party boats produced about 600,000 man-days of fishing in Delaware tidal waters in 1976. Shore and pier fishing accounted for an additional 226,000 man-days; recreational clamming and crabbing, about 139,000 man-days. For marine waters where fishing licenses are not required, a grand total of 965,000 man-days of fishing by 55,000 individual fishermen was estimated by the Division. Based on this survey data, it may be assumed conservatively that there were about 17,000 out-of-state fishermen who accounted for one-third of the total, or about 321,000 days of fishing. Licenses issued for fishing in non-tidal waters totaled nearly 17,000, of which less than ten percent (slightly over 1,500) were purchased by non-residents. Thus, in total, there were about 18,500 non-resident fishermen in Delaware in 1977.

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1 Annual Report, Delaware Department of Natural Resources and Environmental Control, 1977.

2 Miller, Roy W., Marine Recreational Fishing in Delaware, Delaware Division of Fish and Wildlife, 1977.

The most popular areas for fishing in Delaware varied by type of recreational fishing:

Bank, shore, pier and surf fishing was most popular in the Delaware shore area, which accounted for nearly 75 percent of the total for the entire State. Percentages for each section were: Atlantic beaches - 31 percent; Indian River Inlet - 28 percent; Lewes area - 14 percent; Chesapeake and Delaware Canal - 13 percent; Bowers Beach - six percent; Port Mahon - four percent; Augustine Beach and Port Penn - four percent.

Fishing from small boats occurred most frequently in the Delaware River and Bay, which accounted for 59 percent of the State total. Percentages for other areas were: Indian River and Bay - 27 percent; Rehoboth Bay - seven percent; Atlantic Ocean (beach areas) - six percent; Little Assawoman Bay - one percent.

Recreational clamming took place most frequently in Indian River and Bay (53 percent) and Rehoboth Bay (42 percent).

Recreational crabbing occurred primarily in the Delaware River and Bay (54 percent), Indian River and Bay (22 percent), and Rehoboth Bay (14 percent).

The Division's study attributed approximately 242,000 days to marine fishing from small boats registered in Delaware. Of these, nearly 100,000 boat-days (40.8 percent) began at a State-owned access area (Table 15). The most frequently utilized access area was Cedar Creek, which accounted for 37 percent of the activity, and where it is not uncommon for traffic to back up for several miles on a summer weekend. Also very popular were the launch facilities at Lewes (23 percent), Bowers Beach (19 percent), and Port Mahon (17 percent).

Concerning seasonality, it is generally conceded that the boating and fishing season runs from April 1 through October 31, with the heaviest activity occurring between Memorial Day and Labor Day. The hunting season varies according

TABLE 15: BOATING USE AT STATE-OWNED MARINE ACCESS AREAS

1976 FISHING SEASON

Access Area	Boat-Days	Man-Days	Percent
Cedar Creek	36,394	101,904	36.8
Lewes	23,038	64,507	23.3
Bowers Beach	18,322	51,301	18.5
Port Mahon	16,641	46,593	16.8
Woodland Beach	2,506	7,017	2.5
Assawoman	1,074	3,008	1.1
Rosedale Beach	545	1,525	0.6
Augustine Beach	374	1,046	0.4
TOTAL:	98,894	276,900	100.0

Source: Miller, Roy W., Marine Recreational Fishing in Delaware, Delaware Division of Fish and Wildlife, 1977.

to the species; however, most recreational hunting occurs in the fall.

Day Visitors to Sussex Shore Points

A characteristic of Sussex County tourism with extremely important implications is the heavy proportion of day visitors. While exact figures are not available, two extrapolations illustrate this point. The Delaware State Travel Service estimated the total number of visitors to Delaware shore points in 1974 to be approximately five million.[1] Based on traffic counts and on hotel and other summer household occupancy data provided by the Department of Transportation, the Department of Natural Resources and Environmental Control, the U.S. Bureau of Census, and the Rehoboth Beach Chamber of Commerce, it was further estimated that day visitors comprised 4.7 million or 94 percent of the total, while summer home residents and transients staying in overnight accomodations comprised only 300,000 or six percent of the total.

Another estimate derived in a recent study related only to the community of Rehoboth Beach. On the basis of reasonably conservative assumptions concerning occupancy levels in rental units registered in 1976, it was estimated that the population of Rehoboth Beach on a peak holiday weekend might be as high as 69,400, of which 57,350 (83 percent) are day visitors, 10,450 (15 percent) are seasonal overnight visitors, and 1,600 (two percent) are year-round residents (Table 16).

TABLE 16: ESTIMATED POPULATION OF REHOBOTH BEACH ON A PEAK HOLIDAY WEEKEND - SUMMER 1976

Year-round Population	1,600
Seasonal Population	
Occupants of seasonal homes, rental homes, apartments, cottages and rooms (including hotels and motels)	10,450
Day Visitors	57,350
Sub-total - Seasonal Population:	67,800
TOTAL - Seasonal and Year-round Population:	69,400

Source: Bates, Rodger A., The Seasonal Resort Community: Structural Adjustments to Population Undulation, (unpublished Ph.D. dissertation), Department of Sociology, University of Delaware, 1976.

Overnight Visitors

In order to define the market characteristics of overnight visitors to Delaware, interviews were conducted with operators of leading facilities and other individuals knowledgeable of current patterns. Findings are summarized, by county,

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1 Based on: Copeland, Lewis and Leona, Tourists and the Delaware Travel Business During 1974, prepared for the Delaware State Visitors Service, Division of Economic Development.

in the paragraphs following.

New Castle County

As discussed in an earlier section, there are four large hotels of over 150 rooms in New Castle County. All are in the Wilmington-Brandywine Hundred area: the Hotel duPont and the new Radisson Wilmington Hotel in downtown Wilmington, the Sheraton-Brandywine Inn situated north of Wilmington on Concord Pike, and the Brandywine Hilton Inn northeast of Wilmington on I-95. Each of these hotels has a full range of function rooms, meeting facilities, and dining rooms and also features evening entertainment. Room rates are at the top of the range for the area; however, pricing policy features discounts for groups and package plans on weekends and other specified times.

The Radisson has opened too recently to have established predictable operating patterns. The other three large hotels, however, share similar patterns and problems. Business clientele represents 80-90 percent of occupancy. The wellspring of business occupancy flows from the large multi-national corporations, such as DuPont, ICI and Hercules, headquartered in Wilmington and nearby suburban areas. Travel for pleasure produces the remaining 10-20 percent of occupancy. Major attractors to pleasure-oriented travel, according to hotel operators, are Longwood Gardens, Winterthur Museum, Hagley Museum, Brandywine River Museum, Delaware Art Museum, Old New Castle, Odessa, and Franklin Mint.

The characteristics of New Castle County's two principal market types are summarized below:

Business Occupancy

1. Weekly pattern: primarily Monday through Thursday, but has recently been extending to both Sunday and Friday.

2. Seasonality: fairly consistent through three seasons, with a summer dropoff.

3. Average stay: two to two and one-half nights.

4. Room occupancy: almost exclusively single occupancy.

5. Origin: business people and groups come from all over the world.

Pleasure-Oriented Occupancy

1. Weekly pattern: primarily Saturday night, but operators have been attempting to extend to Friday and Sunday, with some success. There has been some tour group demand for midweek space, but it has generally been discouraged by pricing policy except in summer months.

2. Seasonality: almost exclusively spring (April-June) and fall (late September-October), with a sprinkling through the summer and over holiday periods.

3. Average stay: barely over one night. Hotels confirmed that, as discussed above in connection with the Winterthur surveys, many visitors

eat a meal and/or visit attractions in Delaware but do not stay overnight.

4. Room occupancy: primarily double occupancy.

5. Origin: the vast majority of parties originate at points 150-400 miles from Wilmington.

6. Other: most visitors arrive on group tours. Independent package plans are also significant. About 75-80 percent of touring visitors are women and at least 75 percent are senior citizens.

Operators report that advance reservations constitute 90 percent or more of all business. There are very few off-the-road walk-ins -- even at the Brandywine Hilton, which is situated directly off I-95.

On the basis of information supplied, it would be estimated that year-round occupancy rates at these hotels have been in the 70 percent range. The problem times occur when business occupancy is down, i.e., on weekends and through the summer vacation period (July-August). Operators recognize that these are prime times for tourism and have been actively promoting group tours and package plans.

The opening of the Radisson Wilmington Hotel increased the former inventory of rooms in downtown Wilmington by over 70 percent and in all of New Castle County by 20 percent. Although the other three large hotels feel that the Radisson will help the area, both by augmenting the resource base and by adding another voice to promotional efforts, most expect both midweek and weekend occupancy levels to suffer in the short run. According to sales managers for the facilities, State support and/or backup to area promotional efforts would be especially welcome in this environment.

Motels oriented to the Interstate highway system comprise the other major category of accomodations facilities in New Castle County. These motels, each containing 100-150 rooms, are situated at or near exits on I-95 and I-295. Four are in Newark and three are in New Castle. All have restaurants and most can handle functions. Some have evening entertainment, but few have meeting facilities. Operators report good occupancy both during the week, with business-related clientele, and on weekends and holidays, with pleasure travelers. These facilities attract a much higher proportion of off-the-road business and one night stays than do the larger hotels discussed above. They attract very little destination business, except for the limited amount generated by the University of Delaware in Newark.

Based on our interviews, it is estimated that year-round occupancy at these motels has been very good, probably at or above 80 percent. The modest size of the recently completed 44-room addition to the Newark Holiday Inn would not be expected to negatively affect occupancy rates.

Operators reported visitor characteristics for business-related clientele to be the same as those shown above for the large hotels. The characteristics of their tourism-oriented clientele, however, are quite different. In contrast to the large hotels, these motels accomodate more families and fewer tours, and volume is high during summer, when traffic is especially heavy on the turnpikes (see Table 6 above).

Other facilities completing New Castle County's accomodations inventory are small (under 75 rooms), except the uniquely situated 140-room Holiday Inn on Concord Pike, which is reputed to have the highest occupancy rate in Delaware. Its operational pattern, visitor characteristics, and clientele mix are similar to the large New Castle County hotels, with midweek occupancy attributable to business and weekend-summer occupancy attributable to pleasure travel. The manager attributes high year-round occupancy to a combination of factors, including reasonable rates, repeat business built up over the years, and the Holiday Inn reservation system.

Kent County

The hotel-motel inventory in Kent County consists almost exclusively of facilities located along the commercial strip of U.S. Route 13 in Dover. Interviews with managers would indicate that some motels are doing well, with occupancy in the 70-80 percent range on a year-round basis. On the other hand, others are doing poorly, with occupancy below the breakeven point. Overall, there would appear to be little doubt that occupancy rates here are substantially below those in New Castle County.

The clientele mix, however, is about the same. Midweek occupancy depends primarily on business volume, especially during the fall, winter and spring; weekend and summer occupancy, on pleasure-oriented travel.

Operators report that the most important market segments for midweek occupancy are individual salesmen, and the seminars and other business activities of the State government, local business corporations, and Delaware State College. Another important business generator is Dover Air Force Base, which contracts for blocks of motel rooms for reservists in the C-5 and C-141 groups. These contracts, bid on a price basis, generally cover 15-20 rooms for a month at a time.

Most area motels have difficulty with weekend occupancy, with certain exceptions. On summer weekends, when beach areas are likely to be booked, room demand backs up to and beyond Dover. It is worth noting that motels here can offer the advantage of substantially lower room rates within an easy commuting distance of the beach. During the fall, hunters arrive in significant numbers. Special events in the City of Dover, at Dover Downs International Speedway, or at Delaware State College will fill every room in the area. Operators also report that occasional bus tours and family parties will stop overnight in Dover while traveling on north-south trips of two days or more. These people are utilizing U.S. Route 13 as an alternate route to I-95.

Overall, managers describe the general characteristics of Kent County operations to be as follows:

1. Purpose of trip: business-oriented occupancy constitutes about 85 percent of year-round business; pleasure-oriented, about 15 percent.

2. Average stay: about two nights or slightly over.

3. Origin: a significant proportion of guests come from other parts of Delaware. Other important points of origin include Pennsylvania, the District of Columbia, Virginia, and Maryland.

Sussex County

In Sussex County, over 95 percent of accomodation facilities are in the shore area communities of Rehoboth Beach, Dewey Beach, Bethany Beach, Lewes, and Fenwick Island. Occupancy is generated almost exclusively by pleasure travel. It is also highly seasonal. According to operators, the season begins around Easter. Weekend volume begins to build up in May; midweek volume, in June. The season is in high gear from July 4 through Labor Day, with virtually no vacancy. After Labor Day, weekend occupancy is likely to be good as long as the weather stays warm, but midweek occupancy dies down to a trickle. Many facilities close for the winter (about November 1-April 1). In the winter offseason, the few overnight visitors are primarily salesmen during the week, with a sprinkling of tourists interested in getting away from it all on weekends.

According to hotel managers, advance reservations account for 90 percent or more of bookings year-round and nearly 100 percent in the summer. In the two-month summer high season, many hotels will not take reservations for less than a week's stay. At other times of the year, the average stay is likely to be two nights or less. The average number of persons per room is also higher in the summer (three to four) than off-season (one to two).

Most visitors come from fairly nearby. A survey conducted by the Henlopen Hotel shows the five top cities for origin of guests to be Wilmington, Delaware; Washington, D.C.; Alexandria, Virginia; Silver Spring, Maryland; and Newark, Delaware. The five top states are Maryland, Delaware, Pennsylvania, Virginia, and Ohio. At the Atlantic Sands, the manager estimates that 80-85 percent of guests come from a distance of 125 miles or less.

Realtors handling cottage and condominium rentals[1] in the Delaware shore area report that their season runs essentially from Memorial Day through Labor Day, with a scattering of weekend bookings -- particularly at condominiums -- in May and October. The high season, again, runs from the second week in July through Labor Day.

Realtors generally will not handle cottage rentals for periods of less than one week. Overall, the conversations with realtors indicate that roughly 20 percent of the cottages are rented for the full season; about 20 percent, for two weeks to one month; and the remaining 60 percent, for one week. The overwhelming majority of condominium rentals are for one week in season and for weekends off-season.

In general, groups account for the large majority of seasonal rentals; rentals for shorter time periods are for families. The origin of visitors is much the same as for the hotels. The top areas of origin are the Washington metropolitan area (including nearby Maryland and northern Virginia) and Pennsylvania.

A reasonable volume of off-season business in small conventions and corporate seminars has been generated in the Rehoboth area in recent years. Information on 1978 functions at the Henlopen Hotel shows activity building up from March through June, and then picking up again in late August, with good volume in

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1 See Section VI-E of the Resource Inventory and earlier discussion for numbers and geographic distribution of rental units.

September and October. Most functions are on weekends. The vast majority of groups originated in Delaware, but most mid-Atlantic states were also represented. Most groups were small (25-50), but a significant number were in the moderate size range (100-500). In the fall of 1978, for example, the Henlopen Hotel scheduled two groups of about 100 persons and two of 150-200 persons, and participated in accomodating one group with over 200 attendees. Another resource facility which should be mentioned is the Convention Hall at Rehoboth Beach, which can accomodate meetings of up to 1,000 and meal functions of about 500.

It should be noted that the highly seasonal operating pattern of the Delaware shore area is typical of most shore areas in the mid-Atlantic region. The system, which is based on seasonal employment of students and others available only during the summer months, generally works very well for all concerned. Soon after Labor Day, hotels and cottages, along with amusement concessions, shops, restaurants, and other commercial facilities, begin to close. By the first of November, not more than a handful of such facilities remain open. Therefore, substantial increases in off-season volume could not be accomodated in the Delaware shore area. Attempts to alter current patterns would require both substantial investment and significant changes in established operating modes.

SUMMARY

According to the National Travel Survey (NTS), American households made 12.2 million person-trips into Delaware during 1977 on trips 100 miles or more away from home. However, the vast majority (nearly 80 percent) simply passed through Delaware, without stopping overnight, on their way to a destination in another state. Parties headed for Delaware destinations represented 2,165,000 person-trips (17.5 percent of all travel through the State) and those stopping overnight in Delaware on their way elsewhere accounted for 329,000 person-trips (2.5 percent). The transportation mode used for 90 percent of trips to Delaware destinations was the automobile, without camping equipment.

Principal travel characteristics are summarized below for NTS person-trips to Delaware destinations and for other special market segments.

Seasonality

Overall, the high season is summer in Kent and Sussex Counties and spring or fall in New Castle County. Individual facilities or attractions which show strong peaking in July-August include:

New Castle County: Delaware Memorial Bridge, Lums Pond State Park and Fort Delaware State Park. Longwood Gardens in nearby Pennsylvania shows good summer volume, although its peak season is the spring.

Kent County: Killens Pond State Park and the Island Field Site and Archaeological Museum.

Sussex County: Cape May-Lewes Ferry, Cape Henlopen State Park, Delaware Seashore State Park, Holt's Landing State Park, and Trap Pond State Park.

Facilities showing seasonal peaks in spring or fall include:

New Castle County: Winterthur Museum and Gardens, Hagley Museum, Walter S. Carpenter State Park, Brandywine Creek State Park and Bellevue State Park; and Longwood Gardens in nearby Pennsylvania. Volume peaks in December at the Brandywine River Museum in Chadds Ford, Pennsylvania, but is also very good in spring and fall.

Kent County: Volume at the Island Field Site and Archaeological Museum is good in spring and fall, although its peak is mid-summer. Recreational hunting peaks in the fall.

Three attractions have excellent volume in December, when special events are scheduled. These are Longwood Gardens, Hagley Museum, and the Brandywine River Museum.

Purpose of Trip

Market segments differ significantly in their reasons for visiting Delaware. Travel for outdoor recreation represented over half (53 percent) of NTS person-trips to Delaware; business/convention, nine percent; and sightseeing, one percent. Among visitors to Winterthur, sightseeing was the principal purpose of 86 percent; business, only three percent. Among visitors staying overnight, business-related activities account for an estimated 85 percent of year-round occupancy at New Castle County and Kent County hotels and motels, and the majority of off-season occupancy at those Sussex County hotels and motels that remain open year-round.

Ocean beaches are the primary destination of the majority of visitors whose purpose is outdoor recreation, and swimming is undoubtedly the most popular activity. However, Delaware also attracts significant numbers of out-of-state boat owners (about 9,500), fishermen (about 18,500), and hunters (about 2,650) to the coastal areas of Delaware Bay and the Atlantic Ocean.

Length of Stay

Length of stay also differs for the various market segments. The vast majority (85 percent) of NTS person-trips to Delaware destinations remained in Delaware at least one night, and over half (57 percent) stayed two to three nights. But, among visitors to Winterthur, only about 40 percent remain in the area for more than one day.

New Castle County and Kent County hotels and motels report that businessmen average two to two and one-half nights; pleasure travelers average slightly over one night.

At the low end of the scale in terms of time spent in the State, it has been estimated previously that day trips may represent as much as 94 percent of all visits to the Delaware shore area. It has also been estimated that, on a peak summer holiday weekend, over 80 percent of the total seasonal and permanent population in Rehoboth Beach may be day trippers. However, among those who stay overnight in cottages, apartments, hotels, motels and campgrounds, the average stay in the Delaware shore area is probably about one week.

Origin of Visitors

Tabulation of points of origin for visitors to Delaware attractions shows very broad representation, including scores of foreign countries as well as U.S. states and territories. However, as is true worldwide, the vast majority of Delaware's visitors travel from nearby places.

The most important tourism generators for Delaware are consistently Delaware itself, Pennsylvania, Maryland, Virginia, and the District of Columbia. Among NTS travelers, who by definition must be at least 100 miles away from home, these states constitute 75 percent of all person-trips to Delaware destinations.

Operational Problem Areas

Analysis of the operational characteristics of Delaware's accomodations facilities indicates the principal problem areas or needs in each of the three counties to be:

New Castle County: More visitors are needed to augment occupancy at Wilmington area hotels and motels. Additional sightseeing/touring volume on weekends and during the summer would supplement existing business/convention volume midweek. More business and convention volume during the week may also be needed to fill the new Radisson Wilmington Hotel.

Kent County: More visitors are needed to improve low hotel-motel occupancy rates throughout the year, but especially on weekends.

Sussex County: Congestion in July and August is a serious problem. On the other hand, volume is needed to bolster shoulder season occupancy.

Building upon the previous analyses of existing resources and markets, this final section of Chapter I will concentrate on identifying markets which might be considered for future development. The first part will define the range of market types in terms of what the tourist does in Delaware (purpose of trip, type of accomodation and location within the State). The second part sets general guidelines for marketing strategy, based on an overview evaluation of competitive/complementary resources in Delaware's market area.

This section provides a transition to Chapter II, which will add the dimension of cost-benefit analysis to the study. Alternative actions will then be delineated and evaluated in Chapter III.

RANGE OF DEVELOPMENT ALTERNATIVES

A profile of tourism in Delaware is presented in Table 17. The table is a matrix which categorizes both existing tourism and the range of future development alternatives into a simple framework which will facilitate subsequent evaluations.

On the left side of the table are the major categories of tourism which presently exist or could be developed in Delaware, classified by purpose of visit: business/convention, sightseeing/touring, ocean beach, other outdoor recreation, and visit friends and relatives. Under each category is a list of accomodations which could be used, in descending order of cost to the tourist. Visitors who stay in hotels and motels are at the top of the list in each grouping; visitors who do not stay overnight, at the bottom. Column headings across the top of table are geographic subdivisions of Delaware.

Symbols used in the table indicate the level of existing volume, areas where impact is significant, and areas where additional capacity exists.

Summarizing for each geographic area, the Wilmington-Brandywine Hundred area has excellent resources for travel related to both business/convention and sightseeing/touring. Area attractions and hotels generally report unused capacity during all seasons except spring -- but, especially on weekends and during the summer which are prime times for pleasure travel. With the opening of the Radisson Wilmington Hotel, this area has significant new capacity to accommodate both business/convention and sightseeing/touring volume. The Wilmington-Brandywine area also attracts a reasonable volume of travel for the purpose of visiting friends and relatives. Although other areas also receive this type of travel, Table 17 labels such traffic as "insignificant" because of the comparatively low population density of these areas of the State.

The Newark and New Castle areas of New Castle County also attract touring and business-related travel. Accomodations facilities here generally enjoy very good occupancy levels, particularly during the week. Promotion of area attractions, however, could produce additional demand which would undoubtedly be welcomed with new construction. Similarly, other areas of New Castle County could benefit from new tourism promotion or development.

In Kent County, there is considerable capacity within the existing structure to

TABLE 17: PROFILE OF DELAWARE'S TOURISM MARKETS

	Wilm. and New Castle County				Kent County		Sussex Cnty	
	Wilm/ Bdywine	Newark	New Castle	Other	Dover	Other	Shore	Other
Business/Convention[1]								
Hotel/Motel	○■	○	○	✱	○■	✱	○□	✱
Friends/Relatives	-	-	-	-	-	-	-	-
No Overnight	○	○	○	-	○	-	○	-
Sightseeing/Touring								
Hotel/Motel	○■	○■	○■	✱	○■	✱	□	✱
Camping	-	-	-	-	-	-	○□	-
Friends/Relatives	○	-	-	-	-	-	-	-
No Overnight	○	○	○	-	○	✱	○	✱
Ocean Beach								
Hotel/Motel					○■		●□	○■
Cottage/Condominium							●□	
Camping							●	●
Friends/Relatives							●	
No Overnight					●	●	●	●
Other Outdoor Rec.[2]								
Hotel/Motel					○■	✱	●□	
Cottage/Condominium						○■	●□	
Camping							●	○
Friends/Relatives							-	
No Overnight					○		●	
Friends/Relatives								
Hotel/Motel	○	-	-	-	-	-	-	-
Friends/Relatives	○	-	-	-	-	-	-	-
No Overnight	○	-	-	-	-	-	-	-

Key:

- ○ Significant existing volume
- ● Saturation volume in season
- ■ Impact is significant and additional capacity is available
- ✱ Could be considered for future development
- □ Impact is significant and additional capacity is available, off-season only
- \- Insignificant potential or insignificant impact

1 Including activities related to government, universities, colleges and churches.

2 Including fishing, boating, swimming, hunting and other activities on rivers, bays, inland lakes, forests, etc.

Source: Fothergill/Beekhuis Associates

accomodate more tourism, whether related to business, sightseeing or outdoor recreation. Although existing facilities are rather heavily concentrated in Dover, some dispersion into other areas of the county could be considered. It might be mentioned that Table 17 reflects the fact that traffic headed for Delaware's ocean beaches during the summer backs up into Kent County, congesting roadways but also providing business for local restaurants and motels.

In Sussex County, all facilities for tourism are overburdened during July and August, but considerably underutilized in the shoulder seasons. Alternatives for future development should consider means for both alleviating congestion during the summer and bolstering activities (such as fishing, boating, general sightseeing and conventions) which can be enjoyed at the seashore during the spring and fall.

COMPETITIVE/COMPLEMENTARY RESOURCES AND MARKETING TARGETS

The purpose of this section is to put Delaware's tourism resources into perspective and to set general guidelines for marketing strategy, based on a review of competitive and complementary resources in Delaware's market area.

The ocean beaches of Delaware are adjacent to the well-established Ocean City resort area in Maryland. Further south are Virginia Beach and Nags Head. Across Delaware Bay are New Jersey's wide range of shore points, including the Victorian resort of Cape May, Atlantic City and its new gambling casinos, family communities such as Ship Bottom and Asbury Park, and other beaches almost part of the New York metropolitan area. Further north are Long Island and New England shore points. Each of these areas has its own loyal following. Each also shares identical seasonality problems with the Delaware shore area -- including trying to cope with summer congestion and vying to attract new markets off-season.

Recognizing that distance is usually a powerful determinant when other factors are equal, the easiest markets to attract off-season would be those already familiar with the area, that is, those who comprise the high season market. It is suggested, therefore, that off-season promotion for the Delaware shore area concentrate on the Washington, D.C./Maryland/Virginia SMSA, the Baltimore SMSA, and areas of central and western Pennsylvania, such as Lancaster, Harrisburg and Pittsburgh, for which the Delaware shore is at least as accessible as the New Jersey shore.

A quite different geographic situation prevails for marketing activities oriented to Delaware Bay. Its principal competition is the Chesapeake Bay area, which offers the same activities and is much closer to Washington, Baltimore and western Pennsylvania. Therefore, it is suggested that Delaware's hunting, fishing and boating opportunities be promoted primarily to markets in more northerly sections of the Northeast megalopolis, including Philadelphia, Trenton and New York.

The scenic, historic and cultural attractions of Delaware should have a wider geographic marketing potential than outdoor recreation, although not necessarily more volume potential. South of the Chesapeake and Delaware Canal, the topography, history and scenery of Delaware is typical of the entire Delmarva Peninsula, including the eastern shore areas of Maryland and Virginia. Promotion might be undertaken jointly or could be coordinated in a manner calcu-

lated to benefit the entire region.

Similarly, the historic and cultural attractions of the Brandywine Valley complement not only each other, but also the other world-renowned attractions located in the vicinity of Philadelphia, Baltimore, Washington -- and even Richmond and Williamsburg. Properly packaged, these attractions could well be promoted successfully throughout the eastern United States.

CHAPTER II: ANALYSIS OF THE VALUE OF TOURISM TO DELAWARE

INTRODUCTION

This chapter discusses the economic benefits derived from tourism by the State of Delaware and its residents, as well as the costs to the State government of servicing non-resident (out-of-state) travelers. "Travel" ("tourism") is defined as the activities associated with taking a trip involving an overnight stay away from home or to a place 100 miles or more away from home and returning. Specifically excluded are commuting to and from work and local trips for shopping, attending school, and other local personal maintenance and nurturing activities.[1] The terms "travel" and "tourism" are used interchangeably in this analysis.

The following pages provide an economic profile of tourism in the State, including the major economic contributions travel and the travel industry make to the State. Both primary (direct) and secondary (indirect/induced) impacts are included.

Tourism also affects State government program expenditures in many areas, as well as revenue. Estimates of these impacts are provided, both by type of activity and by type of funding. Difficulties in arriving at these estimates are discussed, along with other conceptual issues. Finally a number of individual programs financed by the State are analyzed to determine whether non-resident tourists are reimbursing the State for the costs they incur in State-provided public services.

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1 For the rationale and implications of this definition, see Frechtling, Douglas C., "Proposed Standard Definitions and Classifications for Travel Research," Marketing Travel and Tourism (Seventh Annual Conference Proceedings), The Travel Research Association, Salt Lake City, 1975, pp. 43-47. Data are not available on the volume and characteristics of travel to places 50 to 100 miles away from home, although this is widely considered to be useful in studying travel and tourism. It seems reasonable to conclude that expanding 100-mile and over travel to include trips involving nights away from home regardless of distance produces economic impact estimates similar to those for all non-commuting trips to places 50 miles or more away from home.

When people travel away from home, whether for business, pleasure or other personal reasons, they must purchase transportation of some kind, and often purchase a number of items, ranging from overnight accomodations to souvenirs. This spending activity gives rise to business receipts and tax revenue through sales, excise and other taxes imposed at the retail level. Business receipts are used to pay employee wages and salaries, and State taxes such as those on net corporate income. Traveler expenditures in Delaware, and the employment, payroll (wages and salaries) and tax revenue they generate, comprise the economic impact of tourism in the State.

The expenditure, employment, and payroll estimates included in this section were generated by the U.S. Travel Data Center's Travel Economic Impact Model (TEIM).[1] This model produces estimates of travel expenditures in the State, and then simulates the impact on each of several types of travel industry businesses in the State, producing estimates of travel-generated payroll and employment. The model then distributes the State totals among the counties according to travel-related business activity. State revenues and other receipts generated by travelers are also estimated, based upon the revenues received by the State in each category and assumptions regarding the split of these revenues between resident and non-resident travelers.

The "travel industry" as used herein refers to the collection of 14 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Table 18 for list). These business types are as defined by the Office of Management and Budget in its system of Standard Industrial Classifications (SIC).[2] In each case, with the exception of rail transportation, the relevant SIC code is included.[3]

A "travel expenditure" is assumed to take place whenever a traveler exchanges money for an activity considered part of his trip. Total travel expenditures are broken down into 14 separate categories representing traveler purchases of goods and services at the retail level (see Table 18). Travel expenditures are allocated among counties by simulating where the exchange of money for goods and services actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his destination and some enroute.[4]

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1 For a detailed description of the TEIM, including equations and data sources, see Frechtling, Douglas C., et al., Travel Economic Impact Model, Volume I: Final Economic Analysis Methodology, U.S. Travel Data Center, Washington, D.C., 1975.

2 Standard Industrial Classification Manual, 1972, Office of Management and Budget, U.S. Executive Office of the President, U.S. Government Printing Office, Washington, D.C., 1975.

3 There is no SIC code for rail passenger travel, but data are available from AMTRAK.

4 An example of travel spending attributed to the traveler's origin is the pro-rata share of the fixed costs of owning an automobile, primarily depreciation. Since depreciation costs are included in the price of common carrier transportation, fixed automobile costs are attributed to the residence of the traveler for consistency.

TABLE 18: EXPENDITURE CATEGORIES AND RELATED BUSINESS TYPES

Expenditure Category	Related Business Type (SIC)
Public Transportation	
Air	Air transportation (45)
Airport taxi or limousine	Taxicab companies (411)
Bus	Intercity highway passenger transportation (413)
Rail	National Railroad Passenger Corporation (AMTRAK)
Boat/ship	Domestic water transportation (44 except 441)
Auto Transportation	
Auto/truck - fixed costs with or without camping equipment	Automobile dealers (55 except 554)
Auto/truck - variable costs with or without camping equipment	Gasoline service stations (554)
Lodging	
Commercial lodging	Hotels, motels and tourist courts (701)
Camper/trailer - campside rental fees	Trailer parks and campsites (703)
Own cabin, vacation home	Residential construction (152, 1531)
Food	Eating and drinking places (58)
Entertainment and Recreation	Amusement and recreation services including motion picture theaters (783, 79)
Incidental Purchases	General merchandise and miscellaneous retail stores (53, 59)
Auto Rental	Auto rental and leaving with drivers (7512)

Economic impact is represented by measures of spending, employment, payroll, and tax revenues generated by traveler spending. Payroll includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay and the value of payments in-kind paid during the year to all employees. Payroll is reported before deductions for social security, income tax, insurance, union dues, etc. This definition follows that used by the U.S. Census Bureau in the 1972 Census of Retail Trade.[1]

Employment represents the number of jobs generated by traveler spending, both full- and part-time. As such, it is consistent with the U.S. Department of Labor series on non-agricultural payroll employment.[2]

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1 Census of Retail Trade, 1972, Area Series, United States, U.S. Bureau of the Census, RC72-A-52, U.S. Government Printing Office, Washington, D.D., 1972, p. A3.

2 Handbook of Labor Statistics, 1977, U.S. Department of Labor, U.S. Government Printing Office, Washington, D.C., 1977, pp. 3-4.

The TEIM was designed to use the results of the U.S. Bureau of Census' 1977 National Travel Survey (NTS). The estimates herein are based on that survey.

Finally, the estimates presented herein have been developed by a predominantly conservative methodology. When a range of estimates has been available on the number of visitors, spending per visitor-day, and other input magnitudes, the lower estimate has been employed. Moreover, there are no data currently available on what foreign visitors spend in Delaware and the economic impact. Consequently, the economic profile is far more likely to underestimate the impact of travel on the Delaware economy than to overestimate it.

THE PRIMARY ECONOMIC IMPACT OF TOURISM

Tables 19 through 22 show estimates of travel expenditures in Delaware and each county and the primary (direct) impact of these expenditures on payroll and employment. Travel expenditures, by tourists (non-resident travelers in Delaware), totaled $313.6 million in 1977. This, in turn, generated $180 million in wage and salary income for employees in 14,900 jobs in the State.

To put the travel industry in perspective, comparisons have been provided of travel-generated payroll and employment to personal income and total employment, respectively, in the State. Travel directly generated 1.8 percent of total personal income in 1977, according to the TEIM. This indicates tourism directly accounts for only a small portion of personal income in the State, the balance provided by manufacturing (30 percent in 1976), government and government enterprises (12 percent in 1976), construction (five percent in 1976), and other industries.[1]

It should be noted that personal income is comprised of labor and proprietors' income, as well as dividends, interest, rent and transfer payments. These latter items bulk relatively large in the Delaware economy: labor and proprietors' income by place of work makes up only 80 percent of total personal income in the State. If travel-generated wage and salary income is compared to total labor and proprietors' income, preliminary estimates suggest it accounts for three percent of this magnitude.

Travel directly generated six percent of total non-agricultural payroll employment in Delaware in 1977, according to the TEIM. This makes tourism a major employer in the State, and above the national average of 5.1 percent in 1976 estimated by the Data Center.

New Castle County dominates the State in terms of absolute economic contributions of tourism. Table 19 suggests that New Castle County accounted for 56 percent of travel expenditures, 59 percent of travel-generated payroll and 58 percent of travel-generated employment in the State during 1977. This reflects the relative concentration of attractions, hotel rooms, and other support facilities in the county, and the relatively year-round nature of travel demand there.

However, in terms of relative impact on the county economy, Sussex County looms largest (Table 21). Travel-generated payroll accounts for 4.7 percent of per-

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1 These estimates are derived from special tabulations of the Regional Economics Information System operated by the Bureau of Economics, U.S. Department of Commerce. These data are currently available only through 1976.

TABLE 19

TRAVEL EXPENDITURES, TRAVEL-GENERATED PAYROLL, TRAVEL-GENERATED EMPLOYMENT, PERSONAL INCOME, AND EMPLOYMENT IN DELAWARE IN 1977

Travel Expenditures (thousands of dollars)	$313,600
Travel-generated Payroll (thousands of dollars)	$108,300
Travel-generated Employment (jobs)	14,870
Total Personal Income (thousands of dollars)	$4,491,000
Travel-generated Payroll as a Percent of Personal Income	2.4%
Total Employment (jobs)	247,000
Travel-generated Employment as a Percent of Total Employment	6.0%

Sources: U.S. Travel Data Center; Delaware Department of Labor; U.S. Department of Commerce

TABLE 20

TRAVEL EXPENDITURES, TRAVEL-GENERATED PAYROLL, TRAVEL-GENERATED EMPLOYMENT, PERSONAL INCOME, AND EMPLOYMENT IN NEW CASTLE COUNTY IN 1977

Travel Expenditures (thousands of dollars)	$176,700
Travel-generated Payroll (thousands of dollars)	$64,200
Travel-generated Employment (jobs)	8,630
Total Personal Income (thousands of dollars)	$3,325,000[e]
Travel-generated Payroll as a Percent of Personal Income	1.9%
Total Employment (jobs)	172,000
Travel-generated Employment as a Percent of Total Employment	5.9%

e = Preliminary estimate by the U.S. Travel Data Center

Sources: U.S. Travel Data Center; Delaware Department of Labor; U.S. Department of Commerce

TABLE 21

TRAVEL EXPENDITURES, TRAVEL-GENERATED PAYROLL, TRAVEL-GENERATED EMPLOYMENT, PERSONAL INCOME, AND EMPLOYMENT IN KENT COUNTY IN 1977

Travel Expenditures (thousands of dollars)	$45,900
Travel-generated Payroll (thousands of dollars)	$15,400
Travel-generated Employment (jobs)	2,220
Total Personal Income (thousands of dollars)	$557,000[e]
Travel-generated Payroll as a Percent of Personal Income	2.8%
Total Employment (jobs)	34,100
Travel-generated Employment as a Percent of Total Employment	6.5%

e = Preliminary estimate by the U.S. Travel Data Center

Sources: U.S. Travel Data Center; Delaware Department of Labor; U.S. Department of Commerce

TABLE 22

TRAVEL EXPENDITURES, TRAVEL-GENERATED PAYROLL, TRAVEL-GENERATED EMPLOYMENT, PERSONAL INCOME, AND EMPLOYMENT IN SUSSEX COUNTY IN 1977

Travel Expenditures (thousands of dollars)	$91,000[p]
Travel-generated Payroll (thousands of dollars)	$28,700
Travel-generated Employment (jobs)	4,020
Total Personal Income (thousands of dollars)	$609,000[e]
Travel-generated Payroll as a Percent of Personal Income	4.7%
Total Employment (jobs)	40,800
Travel-generated Employment as a Percent of Total Employment	9.3%

e = Preliminary estimate by the U.S. Travel Data Center

Sources: U.S. Travel Data Center; Delaware Department of Labor; U.S. Department of Commerce

sonal income and nearly 10 percent of employment in the county, far more than indicated in the other two counties. This reflects the relatively undeveloped nature of the Sussex economy, as well as the tourism appeal of the county's beaches and parks.

Kent County, according to the Model, has the lowest absolute levels of travel expenditures and payroll and employment generated by them, but shows more dependence on tourism than New Castle County (Table 21).

SECONDARY AND TOTAL ECONOMIC IMPACT OF TOURISM

The preceding section indicates the primary or direct impact of travel spending on Delaware and each of its counties in 1977. The magnitudes discussed were the payroll and employment generated at the retail level by travel spending. However, the economic effects do not stop here. Rather, travel-related firms spend a portion of their traveler-generated receipts to purchase goods and services from other firms in the county, and employees receiving travel-generated payroll spend this income for goods and services produced by firms in the county as well.

Studies indicate that virtually every productive sector of the economy benefits indirectly from tourism spending, including contract construction, manufacturing, finance, insurance, real estate, communications, and other types of businesses. The tourist dollar is received and re-spent throughout the economy, until it finally disappears into taxes, savings or purchases from firms outside the area, commonly called "imports" even if produced in the domestic U.S.

Deriving estimates of the secondary impact of travel spending is difficult, and a number of approaches have been devised.[1] Given the resources, data and time available for this study, individual factors indicating the secondary impact of travel spending on income and employment could not be derived for 1977. Fortunately, the Data Center developed such factors during a 1975 study for the U.S. Department of the Interior, and these have been used to estimate the secondary effects.[2]

The approach employed to develop earnings (income) and employment multipliers for the central Atlantic coast region in the 1975 study is called the "economic base theory" approach. Commonly used to estimate multipliers, the economic base approach divides the local economy into two segments: (1) firms and individuals serving markets outside the region; and (2) firms and individuals serving markets within the region.

The goods and services regional entities sell outside regional boundaries are considered exports, and are the prime movers of the local economy. If sales and employment serving this market rise, sales and employment serving the regional market is presumed to move in the same direction. For example, the more a restaurant can sell to non-resident visitors, the greater the employment of residents and the more money will be spent by these employees and the restaurant operator in the local or regional economy for goods and services.

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1 For a discussion of different approaches to secondary impact estimation, and references for further study, see Frechtling, Douglas C., et al., Travel Economic Impact Model, Volume I, op. cit., pp. 89-91.

2 Ibid., pp. 89-96.

This approach recognizes that industries and firms within industries may sell their products in both regional and extra-regional (export) markets. For each industry in the region, employment is divided between basic (export) and non-basic (local) markets. Ratios are then developed of total employment or earnings in a region to basic employment or earnings to estimate the multiplier.[1]

Using the "economic base theory" approach, earnings and employment multipliers were developed for Sussex and Kent Counties based upon 1972 industry data. These multipliers represent the total amount of income and employment generated by one dollar of income or one job directly generated in the travel industry, respectively, in the county. To isolate the secondary impact, the multipliers are simply reduced by unity and multiplied by the travel-generated direct payroll or employment estimates.

These multipliers were not computed for New Castle County in the 1975 study. However, they were available for another nearby county which appears to be economically similar to New Castle in terms of economic size and structure. The multipliers are indicated in Table 23, below.

TABLE 23: EARNINGS AND EMPLOYMENT MULTIPLIERS FOR DELAWARE COUNTIES[2]

County	Earnings Multiplier	Employment Multiplier
New Castle	2.38	2.27
Kent	1.72	1.59
Sussex	1.87	1.70

2 Frechtling, Douglas C., et al., Travel Economic Impact Model, Volume II: Final Demonstration Report, U.S. Travel Data Center, Washington, D.C., 1975, p. 54.

Source: U.S. Travel Data Center

The higher a multiplier is, the stronger the "linkage" among businesses and between business establishments and consumers in the county. The lower the multiplier, the more of direct travel-generated receipts and payroll are spent for goods and services produced outside the county, producing "leakages". As could be expected, New Castle County, with its larger and more diverse economy, shows considerably higher multipliers than the other two counties.

One further point. An analysis of the trend in secondary impact between 1967 and 1972 indicates that the multipliers rose over this period.[3] We will not have the 1977 data allowing more recent multiplier estimates until late in 1980. However, these data may well indicate the multipliers employed here are conservative.

Tables 24 through 27 indicate the secondary impact of travel expenditures on payroll and employment in Delaware and each of the three counties. The statewide

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1 For a more complete description of the economic base theory approach, see Charles M. Tiebout, The Community Economic Base Study, Committee for Economic Development, New York, 1962, 84 pages.

3 Ibid., pp. 58-61.

TABLE 24

SECONDARY AND TOTAL PAYROLL AND EMPLOYMENT GENERATED BY TRAVEL, AND PERSONAL INCOME AND EMPLOYMENT IN DELAWARE, 1977

Secondary Payroll generated by Travel (thousands of dollars)	$124,600
Total Payroll generated by Travel (thousands of dollars)	$232,900
Total Payroll generated by Travel as a Percent of Personal Income	5.2%
Secondary Employment generated by Travel (jobs)	15,080
Total Employment generated by Travel (jobs)	29,950
Total Employment generated by Travel as a Percent of Total Employment	12.1%

Source: U.S. Travel Data Center

TABLE 25

SECONDARY AND TOTAL PAYROLL AND EMPLOYMENT GENERATED BY TRAVEL, AND PERSONAL INCOME AND EMPLOYMENT IN NEW CASTLE COUNTY, 1977

Secondary Payroll generated by Travel (thousands of dollars)	$88,500
Total Payroll generated by Travel (thousands of dollars)	$152,700
Total Payroll generated by Travel as a Percent of Personal Income	4.6%
Secondary Employment generated by Travel (jobs)	10,960
Total Employment generated by Travel (jobs)	19,590
Total Employment generated by Travel as a Percent of Total Employment	11.4%

Source: U.S. Travel Data Center

TABLE 26

SECONDARY AND TOTAL PAYROLL AND EMPLOYMENT GENERATED BY TRAVEL, AND PERSONAL INCOME AND EMPLOYMENT IN KENT COUNTY, 1977

Secondary Payroll generated by Travel (thousands of dollars)	$11,100
Total Payroll generated by Travel (thousands of dollars)	$26,500
Total Payroll generated by Travel as a Percent of Personal Income	4.8%
Secondary Employment generated by Travel (jobs)	1,310
Total Employment generated by Travel (jobs)	3,530
Total Employment generated by Travel as a Percent of Total Employment	10.4%

Source: U.S. Travel Data Center

TABLE 27

SECONDARY AND TOTAL PAYROLL AND EMPLOYMENT GENERATED BY TRAVEL, AND PERSONAL INCOME AND EMPLOYMENT IN SUSSEX COUNTY, 1977

Secondary Payroll generated by Travel (thousands of dollars)	$25,000
Total Payroll generated by Travel (thousands of dollars)	$53,700
Total Payroll generated by Travel as a Percent of Personal Income	8.8%
Secondary Employment generated by Travel (jobs)	2,810
Total Employment generated by Travel (jobs)	6,830
Total Employment generated by Travel as a Percent of Total Employment	16.8%

Source: U.S. Travel Data Center

estimates were developed by simply summing those for the three counties.

The tables also indicate the total impact of travel spending: the combined primary and secondary effects. Tourism directly or indirectly generated 5.2 percent of personal income in the State and over 12 percent of employment in 1977, according to these estimates. New Castle County again dominates the absolute estimates, but Table 26 suggests that Sussex County is the most heavily dependent on tourism. Nearly 17 percent of total employment in the county is directly or indirectly related to travel.

Data are not yet available on the relative value of travel to each of the State economies in 1977 as it is presented in this report. However, the Data Center estimates for 1976 indicate U.S. travel spending for domestic trips produced 1.7 percent of the nation's personal income, and provided 5.1 percent of U.S. employment. The Delaware economy is much more dependent upon tourism than the average state, according to these figures. The absolute contribution of travel and tourism is greatest in heavily-urbanized New Castle County, while rural Sussex County is relatively more dependent upon tourism for economic benefits.

In summary, Delaware's stake in tourism is already considerable, and an industry of its size and relative economic contributions deserves more recognition. This recognition should take the form of increased programs to facilitate expansion of the contributions the travel industry can make to the State and county economies.

EXPENDITURE BY TYPE OF VISITOR

All visitors to Delaware are not equivalent in terms of their economic contribution per visitor-day. The amount a visitor spends during his sojourn is dependent on season of the year (lodging costs differ for high season and off-season), travel party size (some costs, such as lodging, are less per person for larger travel parties), county visited (highly-urbanized New Castle County has a higher cost structure for food and lodging than the other two counties), and whether the visitor spends the night in commercial lodging (hotels, motels and motor hotels), in seasonal homes or with friends and relatives (no lodging expense).

Table 28 indicates typical expenditures per person per day for various types of visitors to Delaware, by county and by season. The estimates are based upon careful review of the lodging cost structure in Delaware, typical travel party size, and the types of expenditures various travelers are likely to make. For example, the convention delegate or business traveler generally secures a single hotel room in New Castle County, while those staying in commercial lodging on pleasure trips average 1.8 persons per room. Those who spend the night with friends or relatives in New Castle County incur no lodging expense and generally lower food expense.

The typical commercial lodging visitor in New Castle and Kent Counties is assumed to be in a travel party of 1.8 persons, while the convention or business visitor in New Castle County is traveling alone. Expenditures by travelers visiting friends and relatives is not very sensitive to travel party size since no lodging costs are involved.

In Sussex County, the average travel party in commercial lodging is assumed to comprise two persons per room, while in seasonal homes, the average travel party

TABLE 28: TYPICAL EXPENDITURES PER VISITOR-DAY IN DELAWARE, 1978

County/Type of Visitor	High Season	Off-Season
New Castle County		
Convention/business visitor	$56.00	$50.00
Other visitor in commercial lodging	$46.00	$42.50
Visit friends and relatives	$17.00	$17.00
Kent County		
Visitor in commercial lodging	$41.00	$35.00
Visit friends and relatives	$17.00	$17.00
Sussex County		
visitor in commercial lodging	$43.00	$35.00
Visitor in seasonal home	$23.00	$18.50
Visit friends and relatives	$17.00	$17.00
Day visitor (no nights spent)	$10.00	$10.00

Source: U.S. Travel Data Center

is assumed to be two adults and two children per home.

The differential between high season and off-season is based upon a study of the commercial lodging rate structure of the properties listed in the inventory in Appendix A.

As Table 28 indicates, the high season business and convention traveler staying in New Castle County spends the most per day. Those visiting friends and relatives spend the least per day in all counties.

The table is largely illustrative, and should not be interpreted as based upon detailed survey data on visitor expenditures. Its usefulness lies in indicating the differential impact of various types of visitors in general terms, to guide development of appropriate marketing programs.

It is clear that those visitors staying in commercial lodging spend more per day than those visiting friends and relatives, or staying in seasonal homes. The commercial lodging guest not only spends more for lodging than the other two groups, but also tends to spend more for food, eating in restaurants rather than in homes.

The additional spending generates additional employment and income for travel-related businesses and their employees. This makes the visitor using commercial lodging a "quality" market for the industry. Tourists visiting friends and relatives, on the other hand, spend relatively little per day that they are in the State. It is apparent that if a dollar's worth of promotion can attract the same amount of commercial lodging visitation or friends-and-relatives visitation, the State would do far better to aim at the commercial lodging guest market.

This market also returns more to the State in terms of revenue. Six percent of room sales is taxed by the State. Outside gasoline, other retail activities directly generate little State revenue, if any. Consequently, the State has ad-

ditional reason to aim for this lucrative market.

It is difficult to attach costs and benefits to individual types of visitors because so little is known about their detailed activities while in the State. To estimate the costs and benefits of each type, we would need to know more about what State services and facilities commercial lodging guests use, compared to those staying with friends and relatives, in seasonal homes or in camps. This information is not currently available, and its collection is beyond the scope of this study. Suffice it to say, however, that Table 28 can provide a rough guide to the relative return to the State and its travel industry by different types of visitors.

As noted in Chapter I, the day visitor, especially to the Delaware shore, comprises a significant proportion of total visitors to the State. By definition, these visitors do not purchase lodging, and may purchase only a meal or two, plus gasoline and incidentals. As a consequence, their spending is quite low. Moreover, by avoiding the purchase of lodging and other items, the day visitor returns little to the State to offset his use of State services and facilities. It seems wise, then, to avoid encouraging this market.

Thus far, we have discussed the economic benefits of tourism provided to the businesses and residents of Delaware. However, travel also gives rise to certain costs for the State government. These include the public goods and services provided by the State for the traveler, such as park and recreation areas, highways, and police and fire protection, to name just a few. While the resident traveling away from home in Delaware is helping to pay for these through income taxes and other revenue devices specific to the Delaware citizen, it is not clear that the non-resident traveler is paying his or her own way.

Of course, the non-resident visitor often provides income to the State through the retail tax on commercial lodging, excise taxes, and user fees, such as hunting and fishing licenses and State park admission fees. The question is twofold: (1) is the non-resident paying fully for the services the State is providing him or is he being subsidized by the tax-paying resident? (2) is the answer to (1) in the best interests of the State and its citizens?

In order to properly answer these questions, we must distinguish among the State expenditures financed by residents, State expenditures financed by non-resident visitors, and State expenditures financed by Federal grants. If we are to determine how much of State spending attributable to non-resident visitors is borne by the resident, State expenditures out of Federal grant funds must be subtracted out of total disbursements. This portion of State spending is borne by the Federal taxpayer, and not by the Delaware resident. Of course, the Delaware resident pays Federal taxes which may return to the State in U.S. governmental grants, but this amount is minor, and can be safely ignored in this analysis.[1]

In the tables that follow, Delaware State spending financed out of Federal grants is removed before computing the expenditures attributable to non-resident visitors. This has been accomplished by subtracting out certain Special Fund U.S. Grant receipts, as itemized in the Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978, the basic source document for estimating State expenditures and revenue in this study. Unfortunately, precise estimates of State spending out of Federal grant funds do not exist, so the process is necessarily somewhat judgmental.

The sections below discuss the costs to the State of Delaware imposed by non-resident travelers in 1977, and the receipts derived from these visitors. Included are analyses of the costs and benefits by types of State-financed programs.

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1 In FY 1977, the U.S. government collected 0.4 percent of its total revenue from corporations and individuals residing in Delaware, for a total of $1,553 million. Intergovernmental revenue from the Federal government for Delaware to the Delaware State government totaled $136.4 million. On a pro-rata basis then, Delaware resident Federal taxpayers financed 0.4 percent of these receipts, or a little more than $500,000 in FY 1977. Sources: Commissioner of Internal Revenue, Annual Report 1977, U.S. Government Printing Office, Washington, D.C., 1978, p. 118; U.S. Bureau of the Census, Governmental Finances in 1976-77, U.S. Government Printing Office, Washington, D.C., 1978, p. 20.

THE COSTS OF TOURISM

A detailed analysis of Delaware State agencies and programs indicates the non-resident traveler affects public expenditures in three different ways. First, his very presence in the State produces certain program costs. Second, his use of State streets, roads and highways imposes financial burdens on the State. Third, his direct use of certain State-financed services and facilities produces costs. Each of these is discussed in turn below.

Costs Due to Visitor Presence

When the average visitor enters the State, he requires certain State services related simply to the fact that he is present. He requires police and fire protection, certain court and legal services, certain health and social services, correction of any damage to the environment he produces, the regulation of alcoholic beverages and business services provided to him as a consumer, and other services. In each of these cases, we can think of the visitor imposing one person-day's worth of burden on the State for each day he is in the State.[1]

Carrying this further, we can develop estimates of the "daily census" representing the average number of people in the State on a given day in a given year. This is the sum of the average population of the State and the total number of visitor-days divided by 365 days (visitors per day). We can then develop the proportion of the average daily census made up of non-resident travelers.

Data from the Census Bureau's 1977 National Travel Survey (NTS) and the Data Center's short-trip augment method suggest that non-resident travelers spent approximately 10 million equivalent visitor-days in the State during 1977, for an average of 27,500 visitors per day. When combined with the 582,000 resident population reported by the U.S. Census Bureau for Delaware in 1977, non-resident travelers accounted for about 4.6 percent of the people in the State on an average day during 1977.

Table 29 lists the Delaware State agencies with programs deemed sensitive to the daily census, operating disbursements and expenditures out of capital funds during fiscal 1977, and the amount of these expenditures attributable to non-resident travelers using the 4.6 percent factor. The table indicates that almost $2.8 million in State expenditures are incurred by non-resident travelers in this category.

Costs Due to Road Use

Ninety-four percent of travelers in Delaware travel by automobile, truck or bus according to the U.S. Census Bureau's 1977 NTS. The visitor makes major use of Delaware's streets, roads and highways during his stay. In the past, travelers

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1 This approach to estimating the impact of visitors on certain public services has a relatively long and successful history. For example, see Baumol, William J., et al., The Visitor Industry and Hawaii's Economy: A Cost-Benefit Analysis, Mathematica, Princeton, N.J., 1970, pp. 161-177; Bubul, Stephen J., et al., Impacts of Recreation and Tourism on the Local Economy: Case Studies for Minocqua, Woodruff and Algoma, University of Wisconsin - Extension, Madison, 1978, passim.

TABLE 29

DELAWARE STATE EXPENDITURES SENSITIVE TO DAILY CENSUS AND AMOUNT ATTRIBUATBLE TO NON-RESIDENT TRAVELERS, FISCAL 1977

Agency	Operating Disburse.	Capital Disburse.	U.S. Funds	Attrib. to Non-residents
Judicial	$9,777.3	-	$ 1.2	$ 499.8
Other Elective Offices				
Grants-in-aid (selected)	454.8	-	-	20.9
Revenue refunds (selected)	149.0	-	-	6.9
Legal (except Securities Commission)	2,421.7	-	0.4	111.4
Department of State				
Bureau of Museums and Historic Sites	341.1	$ 0.3	-	15.7
Delaware State Arts Council	376.5	-	328.5	1.7
Department of Finance (except Lottery Commission)	3,540.0	-	-	162.8
Department of Administrative Services				
Alcoholic Beverage Control Commission	328.5	-	-	15.1
Div. of Business and Occupational Reg.	763.2	-	-	35.1
Div. of Public Utility Control	570.7	-	-	26.3
Department of Health and Social Services (part)	-	1,310.5	-	60.3
Office of Medical Examiner	684.8	-	-	31.5
Division of Public Health	23,525.5	-	130.7	1,076.2
Bureau of Substance Abuse	2,645.3	-	-	121.7
Department of Natural Resources and Environmental Control				
Div. of Soil and Water Conservation	1,138.1	-	-	52.4
Div. of Environmental Control	2,583.7	613.2	760.4	112.1
Department of Public Safety				
Office of Secretary	47.2	-	0.1	2.2
Division of Communications	329.1	-	-	15.1
Division of Administration	85.8	-	-	3.9
Division of State Police	9,589.6	168.0	173.4	440.8
Department of Community Affairs and Economic Development				
Division of Consumer Affairs	158.7	-	-	7.3
Fire Prevention	586.6	17.5	37.3	29.5
Delaware American Revolution Bicentennial Commission	7.9	-	-	0.4
TOTAL:	$60,105.1	$2,109.5	$1,432.0	$2,796.0

Source: Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978; U.S. Travel Data Center.

Note: Details may not add to totals due to rounding.

have added to locally-produced congestion requiring alleviation by building additional highways or widening existing ones. In the present, usage damages the pavement and right-of-way, requiring maintenance expenditures by the State.

This suggests that some portion of Delaware's expenditures on the construction and maintenance of its roads and highways, on highway safety, and on the collection of motor fuel excise taxes is attributable to non-resident travelers. Table 30 lists State agency spending in these areas during fiscal 1977, and the amounts involved.

Two approaches to estimating the non-resident visitor portion of these expenses have been employed, and are detailed in Appendix B. In the first approach, it is assumed that these expenditures are related to the non-resident traveler volume of vehicular traffic in Delaware. Volume in certain areas creates congestion that is relieved by construction of additional highways. Volume produces wear and tear requiring that maintenance expenses be incurred. And these activities require an administrative staff that is indirectly a function of traffic volume.

It is also assumed that the amounts spent in this area are related to a current year's traffic volume. In reality, this may be an unsound assumption. This year's highway construction is really a function of need evidenced over several years. This year's service on outstanding debt obligations issued to finance past construction is actually a function of traffic volume in earlier years that indicated the need for new construction. Perhaps most of this year's maintenance expenditures are due to traffic in earlier years. Since these data do not exist, the traffic volume in 1977, and its split between resident and non-resident activity, is used as a proxy for previous years' activity.

The second technique was developed by the Bureau of Traffic, Division of Highways, Delaware Department of Transportation.[1] Here, the operation and maintenance costs for individual areas of the State are examined and portions attributed to visitors based on knowledge of traffic flows. Management costs are added, and capital costs are estimated to provide a total for visitor-generated spending in the Department. The estimation method is detailed in Appendix B to this report.

The average of the two methods (11.5 percent) has been used in Table 30 to estimate State spending sensitive to vehicle-miles of non-resident travelers in the State. The non-Department of Transportation expenses have been allocated to non-resident travelers in the same proportion that non-resident Department of Transportation disbursements are to the total.

Table 30 shows those State expenditures sensitive to traffic on Delaware's roads, streets and highways. Total operating disbursements, including service on bonded indebtedness (payments on both principal and interest, and capital fund disbursements are included). Those expenditures out of U.S. grant money (primarily captial disbursements) have been subtracted from the total before applying the 11.5 percent factor. As the table indicates, almost $6.2 million is attributable to non-resident traveler use of Delaware's system of roads.

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1 Special thanks are due Mr. Raymond Pusey, Chief of the Bureau of Traffic, and Mr. Bruce Littleton of the Bureau staff for providing these estimates.

TABLE 30

DELAWARE STATE EXPENDITURES SENSITIVE TO HIGHWAY/STREET/ROAD VEHICLE-MILES AND AMOUNT ATTRIBUTABLE TO NON-RESIDENT TRAVELERS, FISCAL 1977

($000)

Agency	Operating Disbursements	Capital Disbursements	U.S. Funds	Attributable to Non-residents
Executive				
Office of Highway Safety Coordinator	$ 258.8	-	$ 223.5	$ 4.1
Department of Public Safety				
Division of Motor Fuel Tax	179.7	-	-	20.7
Department of Transportation				
Division of Highways	36,058.7	$39,223.8	21,993.5	6,128.2
Division of Transportation	288.3	-	-	33.2
TOTAL	$36,785.5	$39,223.8	$22,217.0	$6,186.2

Sources: Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978; U.S. Travel Data Center; Bureau of Traffic, Division of Highways, Delaware Department of Transportation (see Appendix B).

Note: Details may not add to totals due to rounding.

Costs of Services and Facilities Used

Some public services and facilities the State provides are associated with individual types of traveler activities. The costs of operating Delaware's State parks and recreation areas, for example, are a function of the number of visitors to these areas, and the amount of time they spend. State costs for regulating hunting, fishing and boating are a function of the person-days of participation in these activities. Fortunately, we have data on non-resident usage of these facilities or participation in activities associated with these State expenditures.

Table 31 includes a summary of data provided by the Division of Parks and Recreation of Delaware's Department of Natural Resources and Environmental Control.[1] It allocates fiscal 1977 operating disbursements and capital fund expenditures out of State funds between residents and non-residents by park, based on the Division's 1975 Travel Use Survey. The non-resident proportion of visitation at the parks varied from a low of nearly 12 percent at Brandywine Creek to a high of 69 percent at Cape Henlopen, and showed an average of 51.2 percent for all areas.

In addition, certain of the Division's management and special program expenditures should be allocated to non-residents. The data described above pertaining to individual parks suggest that 33 percent of the Division's expenditures are attributable to non-resident visitors. This factor is applied to the management and special program spending in Table 31 to estimate the amount attributable to visitors. As indicated, the total is almost $2.8 million.

Expenditures associated with the Division of Fish and Wildlife's fishing, boating and hunting activities can also be split between resident and non-resident travelers based on actual use and participation data. Table 32 shows the total operating fund disbursements and capital fund expenditures for fiscal 1977 for selected sections of the Division of Fish and Wildlife.[2]

The expenditures of the Wildlife Section include costs of operation of wildlife areas, research on wildlife and law enforcement. Expenditures attributable to non-residents were derived by applying the percentage of annual hunter-days in the State attributable to non-residents to State-funded wildlife spending. A 1974-75 Division survey places this at four percent.

Expenditures of the Fisheries Section finance activities in managing freshwater (non-tidal) fishing areas, research, shellfish management, and boating and fisheries enforcement, including registration and licensing. Data are not available on resident versus non-resident fishing days in the State for a recent year. However, the Division reports that 31 percent of boats registered in the State were owned by non-residents. In addition, boat ramp usage permits were sold to

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1 Special thanks are due John E. Wilson, III, Director of Division of Parks and Recreation, and J. Patrick Redden and Stanley Von Essen, Jr., of the Division staff, for providing this information. The complete data supplied by the Division upon which Table 31 is based, appears as Appendix C in this report.

2 Special thanks are due Fred Bonner, Fisheries Biologist, and Robert Graham, Federal Aid Coordinator, both of the Division of Fish and Wildlife, for assistance in this area.

TABLE 31: DELAWARE DIVISION OF PARKS AND RECREATION

EXPENDITURES ATTRIBUTABLE TO NON-RESIDENT VISITORS, FISCAL 1977

($000)

Agency	Operating Disbursements	Capital Disbursements	U.S. Funds	Attributable to Non-residents
Division of Parks and Recreation				
Management and Support	$4,602.5	-	-	$1,518.8
Operations and Maintenance	1,434.9	-	-	678.4
Capital Improvements (State funds only)	-	$4,001.9[1]	$1,951.2	445.6
Special Programs	422.3	-	-	139.4
TOTAL	$6,459.8	$4,001.9	$1,951.2	$2,782.2

1 Includes $1,674.5 thousand for one-time acquisition cost of a new park.

Sources: Division of Parks and Recreation; Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978; U.S. Travel Dat Center.

Note: Details may not add to totals due to rounding.

TABLE 32: DELAWARE STATE EXPENDITURES SENSITIVE TO

RECREATION DAYS AND AMOUNT ATTRIBUTABLE TO NON-RESIDENT TRAVELERS, 1977

($000)

Agency	Operating Disbursements	Capital Disbursements	U.S. Funds	Attributable to Non-residents
Division of Fish and Wildlife				
Management and Support	$ 154.7	-	-	$ 27.7
Wildlife	676.6	$35.4	$293.6	16.7
Fisheries	696.9	-	94.6	204.8
TOTAL	$1,528.2	$35.4	$388.2	$249.2

Sources: Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978; U.S. Travel Data Center; Division of Fish and Wildlife.

Note: Details may not add to totals due to rounding.

an additional 1,844 non-residents. These data suggest that 34 percent of boating activity in the State is by non-residents. Assuming that boat usage is strongly related to fishing activity, this 34 percent factor was applied to all State-funded Fisheries Section expenditures in fiscal 1977.

Part of the Division's budget is spent on management and support. It was assumed that these are related to dollar expenditures by the other sections of the Division: one dollar's expenditure on programs required 12.5 cents of management and support spending. The Fisheries and Wildlife Sections spending attributable to non-residents gives rise to almost $28,000 in management and support spending, following this reasoning.

The total amount of Fish and Wildlife spending attributable to non-residents is estimated at $249,200 in fiscal 1977, as indicated in Table 32.

Total State Costs Attributable to Non-Resident Travelers

Table 33 summarizes the costs borne by the Delaware State government in providing facilities and services to non-resident travelers during 1977. In fiscal 1977, it cost the State $12 million to accomodate these visitors, accounting for 2.2 percent of State spending out of operating and capital funds.

On the average, the State spent 92 cents for each out-of-state traveler, and $1.20 per visitor per day for the facilities and services these visitors required. For every dollar these visitors spent, the State spent 3.8 cents.

It should be emphasized that these costs include State expenditures related to operations and capital improvements used by out-of-state travelers. As discussed above, visitors require State services related to their presence in the

TABLE 33: DELAWARE STATE EXPENDITURES ATTRIBUTABLE TO NON-RESIDENT TRAVELERS, FISCAL 1977

($000)

Source	Amount
Attributable to non-resident traveler presence in the State (daily census)	$ 2,796.0
Attributable to non-resident traveler vehicle-miles in the State	6,186.2
Attributable to park and recreation facilities usage of non-resident travelers in the State	2,782.2
Attributable to fish and wildlife recreation days of non-resident travelers in the State	249.2
TOTAL State expenditures attributable to non-resident travelers	$12,012.6

Source: Tables 29 through 32.

State, their use of highways and other roads, their use of parks and recreation areas, and their use of fish and wildlife facilities and services. These expenditures appear to be closely related to visitor presence and use of facilities, and could be expected to fluctuate depending upon the volume of non-resident visitors and visitor-days.

No attempt has been made to accurately quantify State "overhead" expenses that could be attributed to these programs. These expenditures cannot be allocated to any particular program or department, but rather arise from governing the State and the administration of government in general. While this concept has some intellectual appeal, it is difficult to agree upon an operational definition of such overhead expenses, and then to apply it to determine how much of governing and administration can fairly be attributed to out-of-state travelers. While these costs may well be substantial, because of the conceptual and estimation difficulties they are not included in the scope of this study.

The Division of Economic Development of the Delaware Department of Community Affairs and Economic Development spent $72,100 during fiscal 1977 to promote Delaware as a tourist destination. This spending is not included among expenditures attributable to non-resident travelers during the year because it is not responsive to the number of visitor-days in the State, traffic on highways and roads, or use of park, recreation wildlife or fishing facilities.

The tourism promotion expenditures are aimed at increasing the number of visitor-days in the State, rather than dependent on the volume of visitation. Consequently, it is not an expense attributable to these visitors.

However, in computing the costs and benefits of increasing visitation to the State promotional spending, these expenditures should be included. An example of the analytical process follows (the relationship between promotion expenditures and additional visitation is illustrative only):

Objective:	To increase visitor-days by 100,000	$146,000
Benefits:	State receipts attributable to 100,000 visitor-days at $1.46 per visitor-day	$25,000
Costs:	State promotional spending to attract 100,000 additional visitor-days at $1.20 per visitor-day	$120,000
Excess of State receipts over State expenditures:		$1,000

STATE REVENUE FROM TOURISM

Non-resident travelers in Delaware generate receipts for the State through taxes on sales and net income of travel-related businesses in the State, taxes on income earned by the employees of the businesses, user fees, license fees, fines and direct payments for hospital services. Table 34 indicates the amounts estimated to have been generated by non-resident visitors to the State during fiscal 1977 by category of tax or fee.

In most cases, the same approach used to estimate State expenditures on behalf

TABLE 34

DELAWARE STATE RECEIPTS ATTRIBUTABLE TO NON-RESIDENT TRAVELERS, FISCAL 1977

Agency/Source	Total FY 1977 Receipts ($000)	Proportion for Attributing to Non-Resident Travelers (%)	Receipts Attributable to Non-resident Travelers ($000)
Division of Revenue			
Personal Income Tax (direct)	$190,958.7	2.4[1]	$4,583.0
Corporation Income Tax	30,522.1	[2]	313.6
Hotel/Motel Accommodations Tax	838.1	95.0[3]	796.2
Harness and Thoroughbred Racing Taxes	5,371.4	4.6[4]	247.1
Cigarette Tax	12,246.1	4.6[4]	563.3
Alcoholic Beverages Tax	4,372.5	4.6[4]	201.1
Mercantile Tax	24,414.3	Direct[5]	2,052.6
Division of Motor Fuel			
Motor Fuel Tax	27,654.7	11.5[6]	3,180.3
Division of Parks and Recreation			
User Fees and Other Sources	818.6	Direct[5]	486.7
Division of Fish and Wildlife			
Hunting and Fishing Licenses	266.4	Direct[5]	82.1
Hunting and Fishing Fines	3.4	30.0[7]	1.0
Small Boat Licenses	244.1	31.0[8]	75.7
Boat Ramp Certificates	1.9	100.0[9]	1.9
Judicial			
Highway Fines	1,183.1	11.5[6]	136.1
Division of Public Health			
Hospital Treatment Sales	132.0	4.6[4]	6.1
Standardbred Development Fund	428.2	4.6[4]	19.7
Division of Unemployment Insurance			
Unemployment Compensation Taxes	21,934.3	[10]	1,819.0
TOTAL	$321,389.9		$14,565.5

[1] The ratio of travel-generated direct personal income in Delaware to total personal income (See Table 23).

[2] U.S. Travel Data Center studies of corporate income taxes indicate that the ratio of Federal corporate income taxes to receipts for all types of businesses in the travel industry is about one percent. The Delaware Corporation Income Tax is based on the Federal corporate income tax, in terms of definition and coverage. In fiscal 1977, Federal corporate income tax collections totaled $301.2 million, while Delaware corporation income taxes totaled $30.5 million. Taking one percent of the ratio of Delaware to Federal corporate income tax collections produces an average ratio of 0.1 percent. Applying this to total non-resident visitor spending in the State produces the receipts attributable to non-resident travelers.

[3] It is assumed that 95 percent of rooms sales of Delaware hotels and motels is to non-residents.

[4] Based on the daily census approach to estimating expenditures attributable to non-resident travel presence.

[5] No set proportion was used; rather, the receipts attributable to non-resident travelers were estimated directly from the base data.

[6] Based on the approach to measuring the proportion of State expenditures attributable to non-resident traffic in the State (see Appendix B).

[7] Estimate of proportion of combined hunting and fishing days attributable to non-residents.

[8] Proportion of boat licenses owned by out-of-state residents, according to the Division of Fish and Wildlife.

[9] All boat ramp usage fees are attributable to out-of-state residents.

[10] Unemployment compensation taxes are paid based on employee wages and salaries. The ratio to State unemployment compensation tax receipts to total wage and salary income during 1977 ($2,804 million) is 0.78 percent. This was then applied to total (direct and indirect) travel-generated payroll, as shown in Table 23, to derive the estimate.

Source: *Governor's Recommended Budget for Fiscal Year 1979 and Financial Report for Fiscal Years 1976, 1977 and 1978*; various state agencies (see footnotes); U.S. Travel Data Center.

of non-resident tourists is also employed for comparable categories on the revenue side. The daily census proportion of visitors was used to estimate the relevant receipts of excise taxes on cigarettes and alcoholic beverages, racing taxes, and hospital treatment sales. The proportion of highway expenditures used to estimate highway costs attributable to visitors was used to estimate motor fuel taxes and highway fines paid by these visitors. Visitor-generated revenue for the Division of Parks and Recreation and the Division of Fish and Wildlife were developed by these divisions or estimated from data supplied by them.

There are several sources of receipts not matched by expenditure programs. Employees in travel-related firms earn income from non-resident visitor business, and the State personal income tax on the earnings from those employed directly by this business are included.[1] Travel-related corporation income tax payments were estimated from the relationship of overall business receipts to corporate tax payments. Virtually all of the hotel-motel accomodations tax is attributed to out-of-state residents. Finally, unemployment compensation taxes paid directly and indirectly by travel-related firms on behalf of their employees have been included.

It is estimated through these techniques that non-resident travelers returned nearly $14.6 million to the State during 1977. This averages out to $1.12 per visitor and $1.46 per equivalent visitor-day. For every dollar spent by these visitors, the State received 4.6 cents in receipts. These receipts accounted for nearly three percent of all State receipts from taxes, licenses, fees, permits and fines during fiscal 1977.

DELAWARE STATE RECEIPTS AND EXPENDITURES ATTRIBUTABLE TO NON-RESIDENT TRAVELERS

The Delaware State government receives net revenue from the non-resident travelers that visit the State. As indicated in Table 35, the excess of State receipts from non-resident visitors over the expenditures required to accomodate them totaled nearly $2.6 million in fiscal 1977. For every one of these travelers, the State netted 20 cents. Since so much of the State's visitor traffic is pass-through without an overnight stay, the amount netted per visitor per day is higher, about 26 cents.

On the average, each dollar the non-resident traveler spent in the State returned 4.6 cents in receipts of various kinds, and netted the State nearly one cent.

Of course, examining the net receipts of the State as a result of visitor activity is a rather narrow view. In addition to producing State revenue, visitor expenditures also provide jobs and income for State residents, and revenue for local governments. In one important sense, State expenditures would be higher without the economic contribution of these visitors. Were the travel industry

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1 State personal income tax receipts on earnings directly generated by travel spending only have been included. Taxes on indirect or secondary earnings have not been included since there is a large area of indirect or secondary costs to the State which would have to be addressed as well. A full explanation of secondary costs and benefits are beyond the scope of this study.

TABLE 35

COMPARISON OF DELAWARE STATE RECEIPTS AND EXPENDITURES ATTRIBUTABLE TO NON-RESIDENT TRAVELERS, FISCAL 1977

Measure	State Receipts Attributable to Non-resident Travelers	State Expenditures Attributable to Non-resident Travelers	Excess of Receipts Over Expenditures
Total (thousands of dollars)	$14,565.5	$12,013.6	$2,551.9
Average per Non-resident Traveler	$1.12	$0.92	$0.20
Average per Non-resident Traveler per Day	$1.46	$1.20	$0.26
Average per Dollar of Non-resident Travel Expenditure in State	$0.046	$0.038	$0.008

Source: Tables 33 and 34; U.S. Travel Data Center.

in Delaware to disappear tomorrow, State welfare and unemployment compensation costs would be markedly higher to help offset the loss in jobs and income.

The State should not be in the business of promoting tourism merely to boost its budget surplus, but to improve the economic welfare of its citizens as well. While it is encouraging to know the State government does not lose per each visitor using its facilities and services, the more important point is that the entire State economy benefits.

SUMMARY

During 1977, 13 million non-resident travelers visited Delaware and spent a total of 10 million equivalent days in the State. These visitors spent $313 million during their stay, which became business receipts for Delaware industry.

The industry in turn directly provided nearly 15,000 jobs, for about six percent of the State's total non-agricultural payroll employment. The employees in these businesses earned $108 million directly from the non-resident visitor.

The impact of these visitors on the Delaware economy did not stop at the retail level. Indirect or secondary effects were created as the travel-related business firms purchased goods and services from wholesalers and others in the State, and as the employees spent their payroll income. Including the secondary effects on employment and payroll, the visitors' $313 million expenditure created 29,000 jobs paying nearly $233 million in wages and salaries. Total primary direct and secondary employment accounted for over 12 percent of the jobs in Delaware during 1977.

New Castle County, the most highly urbanized and industrialized of Delaware's three counties, garnered the most in travel spending and travel-generated jobs and payroll. However, relative to the size of the local economy, non-resident travel was most important in Sussex County.

The non-resident visitor required certain goods and services from the State during 1977. These include highways, police and fire protection, parks and fish and wildlife facilities. The State spent $12 million in providing these goods and services to her visitors. Over half of this related to the highway, streets and roads for the auto traveler.

In return, the visitors paid taxes on items such as motor fuel and hotel rooms, bought hunting and fishing licenses, and paid park user fees. Their expenditures gave rise to mercantile tax, corporate income tax, personal income tax and other receipts for the State. In total, visitors generated over $14 million in revenue for the State, or about 4.6 cents for every dollar they spent.

State government benefits from non-resident travelers in Delaware. In 1977, the State received $2.5 million more in revenue than it paid out to service non-resident travelers. On the average, each traveler left behind a net amount of 20 cents for the State treasury.

Of course, the State of Delaware should not be in the business of developing a market for travel solely to increase its budget surplus. The overall economic benefits in terms of jobs and income for its citizens are far more important than the receipts-expenditure balance. However, it is encouraging to know that the State does not lose money on its transient guests, and that the travel industry in Delaware is a viable and vital part of the State economy.

CHAPTER III: POLICY ANALYSIS

INTRODUCTION

In this chapter, attention will turn to tourism policy in Delaware and alternative courses of action that are open to the State. The Terms of Reference for the study reflect concern that any policy proposed to the State for tourism development be founded on a solid economic rationale and that linkage with the private sector be strong. Focus should be not only on policy but also on strategy -- promotional strategy geared to market potentials, organizational strategy oriented to major issues, and capital investment strategy in appropriate situations. It is intended that this study be reviewed by the Executive and Legislative branches of State government with regard to decisions that could materially affect the future of tourism in Delaware.

The policy analysis will be divided into three basic parts. In the first part, parameters, goals, and priorities that evolve from foregoing economic and market analyses are set forth. In the second part, institutions in Delaware that shape or implement policy are described. The third part is a review of alternatives. Basic structural policy alternatives are reviewed that represent varying degrees of commitment to tourism development by the State; strategy alternatives are analyzed within the framework of different policies; and certain tactical alternatives are discussed in regard to specific issues.

ECONOMIC ANALYSIS

The economic analysis in Chapter II provides the appropriate context for consideration of what the State's tourism policy should be, that is, how much of the State's resources can reasonably be committed to support and promote tourism growth. The analysis shows that tourism does make a significant contribution to the State's economy, but that there are definite associated costs. It shows that some tourists are more beneficial than others by economic standards, and that for revenues to exceed costs, promotional efforts should be aimed at favorable markets.

One problem in evaluating tourism is perspective. Tourism cuts across economic lines -- it is part transportation and part services and part retail trade; it creates demand for construction and for finance, insurance and real estate; it touches virtually every economic sector, but it is seldom evaluated as an economic entity in its own right.

Table 36 shows total travel expenditures compared to selected other economic activities. Tourism expenditures in 1977 were $213.6 million. This is comparable to all cash farm income in Delaware, which was $281 million in 1975.

In terms of employment, tourist expenditures generated 14,870 jobs in 1977. Compared to employment by general industrial classifications, tourism is larger than transportation and other utilities, wholesale trade, and finance, insurance and real estate. These comparisions provide the perspective necessary to insure that the importance of tourism is neither exaggerated nor underestimated.

The first basic conclusion must be that the economic contribution of tourism to the State should be protected. As a matter of policy, tourism should be recognized and supported.

MARKET ANALYSIS

The economic analysis in Chapter II showed that the State should concentrate its efforts on attracting those tourists who spend enough to cover attributable costs, specifically identifying tourists who stay overnight in commercial accomodations as the prime "quality" market.

The analysis of Delaware's markets in Chapter I describes existing tourism patterns and identifies opportunities for improvement. It discusses the activities of the quality market, that is, the overnight hotel visitor, and hotel occupancy rates are a key unit of measurement.

In this section, the goal is to quantify marketing opportunities in economic terms. This quantification will be referred to as "gross promotable potential", representing opportunities where promotional efforts might be effective in increasing utilization of hotels and other tourist facilities.

From a general point of view (rather than that of a specific property), some

TABLE 36

TRAVEL EXPENDITURES AND EMPLOYMENT IN DELAWARE
COMPARED WITH OTHER ECONOMIC ACTIVITIES

Travel Expenditures (1977)[1]	$313,600,000
Gross Farm Income (1975)[2]	$281,800,000
Travel generated employment (1977)[1]	14,870
Employment by general industrial classifications (1974):[3]	
Construction	37,730
Manufacturing	67,741
Transportation and other public utilities	10,760
Wholesale trade	13,226
Retail trade	37,432
Finance, insurance, real estate	10,632
Services	35,036

1 Chapter II.

2 Dimensions in Delaware - 1977, Office of Management, Budget and Planning, State of Delaware, May 1978, Table G-5, p. 280.

3 Ibid., Table B-18, p. 61-70.

business is promotable and some is not. Little can be done to promote additional routine business-related tourist traffic since that volume is essentially a function of the local economy. Much transient overnight tourism traffic, including both business and pleasure travelers, is not promotable since it is a function of external travel patterns not related to local attractions. However, business meetings and conventions are promotable, and pleasure tourist traffic oriented to local attractions is certainly promotable.

Table 37 shows an estimate of gross promotable potential tourism expenditures in each Delaware county based only on those economically desirable tourists who stay in hotels and motels. Estimates of current occupancy are derived from the analysis in Chapter I. In each case a "target" increase of five percentage points in occupancy is proposed as realistic, significant, and attainable. Tactics to achieve the target increase will be discussed later in this chapter. At this point, the purpose is to establish the major strategic objectives.

In New Castle County, there are 2,834 hotel/motel rooms and current average occupancy level is estimated to be a healthy 70 percent.[1] The opportunities for improvement discussed in Chapter I focused on weekends all year, the entire summer season and business meetings and conventions during midweek per-

1 This estimate takes into account the impact of the opening of the Radisson Hotel in Wilmington.

iods. The effect, if the target of 75 percent occupancy is reached, would be about 93,000 additional person-nights in New Castle hotels. As discussed in Chapter II, total daily expenditures per person is about $45, which would mean $4,189,000 in additional tourist expenditures.

In Kent County there are fewer overnight units, 792, and current occupancy levels are estimated to be a less-than-healthy 55 percent in what appears to be a somewhat overbuilt situation. Achieving a target of 60 percent occupancy seems reasonable through promotion of weekend tourist business and midweek seminars and meetings. This would result in a gain of about 26,000 person-nights and about $1,041,000 in expenditures assuming a daily expenditure of $40 per person. Additional midweek routine business-related volume will grow at its own pace over time.

In Sussex County, there are 1,687 rooms in hotels and motels, which is a small number compared to approximately 7,000 seasonal homes. The 25 percent occupancy estimate for the year really means about 50 percent occupancy during a six month season, May through October, and the bulk of that occupancy is concentrated in July and August. An estimated target increase of five occupancy percentage points is judged to be attainable through promotion of the shoulder season, that is, in the spring, May and June and, in the fall, September and October. The potential is estimated to be 31,000 room-nights and $2.5 million in expenditures at an estimated $40 per day per person during the off-peak season.

Statewide gross promotable potential is estimated to be 97,000 room-nights, 181,000 person-nights and $7.7 million in total expenditures. This is only direct expenditures and does not include secondary and indirect effects.

In addition to motels, it is estimated that there are 7,000 seasonal homes in Delaware, virtually all in the Sussex County shore area. At an assumed average party size of four per home and assuming a 60-day season, this category of tourist represents an estimated 1,680,000 person-nights. The average daily expenditure per person was estimated in Chapter II to be around $20, so the direct economic contribution is about $34 million, nearly all in Sussex County. This figure does not take into account the importance of second homes to the construction industry, and other sectors such as finance and services that participate in the creation and maintenance of the facilities.

The second basic conclusion is that, as a matter of policy, special efforts should be made to exploit strategic marketing opportunities in each county to attract quality tourists, that is, those who stay overnight in commercial accomodations.

The third basic conclusion is that the importance of seasonal homes to Delaware tourism should be recognized and concern for well-planned continued development should be an integral part of State policy.

TABLE 37

ESTIMATED GROSS PROMOTABLE POTENTIAL BY COUNTY, 1979

County	Number Hotel/Motel Rooms	Estimated Average Annual % Occupancy	Promotion Strategy	Percent Occupancy Target	Estimated Number Persons Per Room	Estimated Total Daily Expenditures Per Person	Annual Gross Promot. Potential: Number Room Nights	Number Person Nights	Total Expenditures
New Castle County	2,834	70%	Weekends all Year; Midweek Summer Conventions	75%	1.8	$45	51,720	93,097	$4,189,000
Kent County	792	55%	Weekends all Year; Seminars, Meetings	60%	1.8	$40	14,454	26,017	$1,041,000
Sussex County	1,687	25%	Shoulder Season	30%	2.0	$40	30,788	61,576	$2,463,000
						TOTAL:	96,962	180,690	$7,693,000

State policy on tourism is shaped daily by decisions made and actions taken in multiple places within government and the private sector. The institutional framework of tourism involves several cabinet departments, special task forces and other special State activities, and counterpart institutions in the private section that are concerned with general tourism growth. It is important, if State policy is to have impact, that there be cooperation and coordination among government activities and that there be strong linkage with the private sector.

STATE INSTITUTIONS

Department of Community Affairs and Economic Development: Delaware State Travel Service

Promotion of the State of Delaware as a tourism destination is the responsibility of the Department of Community Affairs and Economic Development, and in particular, the Delaware State Travel Service, which is located in the Division of Economic Development. In recent years, tourism promotion has not been an important activity within the Department in financial terms, but the staff, including personnel on loan from offices outside the Travel Service, have succeeded in maintaining a level of credible promotional activities.

Table 38 shows the budget breakdowns for the Delaware State Travel Service as actually spent in FY 1979 and the Governor's recommended budget level for FY 1980. (The FY 1980 budget was not finally approved by the Legislature when this study was submitted.)

The 1979 budget of $77,000 was set at a bare subsistence level. The allocation for salaries and wages provided no staff beyond the Tourism Program Manager. Other items were also minimal, and there was no budget for advertising.

The budget request for 1980, $467,141, allows for a more meaningful program, including $119,875 for advertising. The salaries and wage level covers the professional and support staff required to implement the promotion program and provide technical assistance to public and private institutions contributing to tourism development.

The objectives of the proposed 1980 program are enunciated by the State Travel Service as follows:

1. To promote Delaware as a tourist attraction to increase the number of overnight visitors who use public accommodations.

2. To assist present facilities in increasing attendance, occupancy rates and patrons to provide more jobs in the travel industry.

3. To promote Delaware by providing photographs, background material and articles to the media throughout the United States, Canada and selected foreign markets.

TABLE 38

DELAWARE STATE TRAVEL SERVICE BUDGETS

ACTUAL FY 1979 AND REQUEST FY 1980

Budget Item	Actual FY1979	Request FY1980
Wages and Salaries, including Benefits	$21,900	$140,866
Conference Fees and Dues	12,000	16,400
Travel	2,000	21,275
Printing and Binding	9,200	98,625
Telephone	7,000	26,000
Postage	10,000	17,000
Miscellaneous Supplies, Services, Equipment	14,900	27,100
Advertising	-	119,875
	$77,000	$467,141

4. To seek investment in and the development of private recreational facilities which will be compatible to Delaware's environment.

5. To provide informational and promotional brochures to prospective travelers and to information centers, travel agents, and tour brokers throughout the country.

To fulfill the objectives, the advertising program proposed by the State Travel Service has four components:

1. Promotion of northern Delaware for weekend travel and the shore area for midweek travel.

2. Promotion of Delaware as a tourist destination in areas 200 to 350 miles from the State.

3. Promotion of the off-season, specifically northern Delaware in summer and winter and the shore area in spring and fall.

4. Promotion of small conventions and conferences at times when hotel occupancies are weak.

A portion of each of the above four component program budgets would be reserved for cooperative advertising with facilities, associations and government agencies throughout the State.

The budget covers, in addition to the advertising program, programs for public relations and promotion aimed at the same objectives. Also covered is a small expenditure for expenses in promoting Delaware as an investment opportunity for private recreational development.

As a general comment, the objectives and program strategy of the State Travel Service are almost completely consistent with the conclusions reached in the foregoing economic and market analyses. Specifically, there is concurrence in emphasis in the objective of overnight visitors who use public accommodations. Also there is concurrence in a strategy to focus on promotion tied to specific times and places to fill identified gaps in tourism patterns or to relieve identified problems. The only point where there is room for debate is item #2, where priority is given to markets over 200 miles away rather than the more readily accessible metropolitan markets closer to Delaware. This will be discussed later.

Other Cabinet Department Activities

Although many Departments of State government touch upon tourism, four should be briefly noted as major participants in its development.

Department of Natural Resources and Environmental Control

Through the Division of Fish and Wildlife, the Department of Natural Resources and Environmental Control is responsible for hunting and fishing in Delaware. Through the Division of Parks and Recreation, it is responsible for development, maintenance and administration of State parks and preparation of the State Comprehensive Outdoor Recreation Plan. The Department also has overall responsibility for environmental issues.

Department of State

Through the Division of Historical and Cultural Affairs, the Department of State is responsible for development, maintenance and management of landmarks, State museums, and historic sites.

Department of Transportation

Through the Division of Highways, the Department of Transportation is responsible for planning, constructing and maintaining the highways on which tourists travel.

Department of Agriculture

The Department of Agriculture manages all State forests. The forests are open to the public for primitive camping and general recreation.

Other State Activities

Tourism Advisory Board/Tourism Policy Study

A Tourism Advisory Board was formed expressly to monitor this Tourism Policy Study. The Board is comprised of representatives of State departments involved with tourism (State, Transportation, Natural Resources and Environmental Control and Community Affairs and Economic Development) plus representatives of both sides of the State Legislature, representatives of the University of Delaware, and representatives of a cross section of the private sector (chambers of commerce, museums, other tourism development-oriented organizations). The Board as now constituted is a single-purpose body, but consideration is being given to a more permanent role.

Governor's Conference on Tourism and Recreation

The first Governor's Conference on Tourism and Recreation was in 1977, and the second was held in March 1979. Sponsored by the Delaware State Travel Service, SCORP, Sea Grant Marine Advisory Service, the Delaware Travel Council, the Delaware Recreation and Parks Society, and the Association of Chambers of Commerce in Delaware, the conferences successfully provided a forum for discussion of the critical issues and disparate problems related to tourism and recreation development. Proposals for implementation that were made in the first conference were reviewed in the second conference to measure actual progress.

Governor's Task Force on Marine Recreation

The objective of the recently organized Task Force on Marine Recreation is to review marine recreation needs and problems and to produce a plan of action, coordinated between the public and private sector, that will encourage economically and environmentally sound development of needed facilities and services.

Delaware Sea Grant Marine Advisory Service, University of Delaware

The University of Delaware, through the Delaware Sea Grant Marine Advisory Service, is active in many areas that affect tourism, including shoreline erosion, commercial and sport fishing and ecology issues. Tourism is a matter of increasing interest.

Coastal Management Program

The Coastal Management Program is administered by the Office of Management, Budget and Planning. It is deeply concerned with industrial location in coastal areas, tourism and recreational development, and other elements of the overall State Coastal Zone Management Plan. The program can make funds available to other organizations for relevant projects.

Delaware Tomorrow Commission

Established by the Governor in 1974, the Delaware Tommorrow Commission was responsible for developing a Statewide Plan for growth, examining policy

concerning industrial, commercial, and residential development, including open space, recreation and transportation, and making recommendations as to the path of economic growth and the policies as required.

PRIVATE INSTITUTIONS

There are many aspects of tourism development that are better handled by the private sector, and other aspects that are better handled by government. For maximum impact, there should be a solid linkage between the two and a mutual understanding and respect between them. In general, the State will depend on local institutions to initiate promotional ideas, to organize local private interests, and to follow up. Following are brief comments on private institutions in Delaware.

Chambers of Commerce

In Delaware, the chambers of commerce at the State and local levels are generally highly active development institutions in the private sector. Although tourism per se has not been a traditional area of emphasis for these organizations, many in Delaware have been involved.

The State Chamber of Commerce is based in Wilmington and is, de facto, a significant tourism institution since it is the recipient of most tourist inquiries about the State's attractions and facilities. There is at present no organization in Wilmington or New Castle County set up strictly for tourism. To consider ways to fill this void, the State Chamber has initiated a feasibility study of a convention and visitors bureau for the area, focusing particularly on formulae for financing by the various private beneficiaries. The form of organization and its connection, if any, with the Chamber is part of the study. If deemed feasible, a convention and visitors bureau could contribute materially to an increase of utilization of tourist facilities.

Local chambers of commerce have varying degrees of concern for tourism. In Rehoboth Beach the Chamber is the main advocate for tourism promotion and development. In Dover, the Chamber is currently without an executive director, but it has played a strong promotional role in the past. In Milford, the Chamber maintains a visitors' information office and manages an imaginative program of events aimed at drawing tourist. In some towns, such as Milford or Seaford or Laurel, tourism at the shore provides a flow of traffic by and through the community. How to tap that flow is a challenge to the local chamber. The local chambers of commerce are organized and represented by the Association of Chambers of Commerce in Delaware.

Greater Wilmington Development Council

The Greater Wilmington Development Council is concerned with tourism growth as part of its main function of providing research and planning for local issues. This Council is concerned, for example, that there be a well-conceived and funded convention and visitors bureau to take the lead in tourism matters in the Greater Wilmington area. The Council has been deeply concerned over the health and development of downtown Wilmington. The prospects for the new Radisson Wilmington Hotel and the health of all area hotels is a matter of continuing interest.

Delaware Travel Council

The Delaware Travel Council has at present 70 members representing hotels, restaurants, attractions and other relevant aspects of the tourism industry. Its objective is tourism development. The problem with the Travel Council is that the degree of commitment of members is minimal, only $10.00 per year, so there is no permanent staff or funds to implement any kind of a program. It does not at this time have the solid organizational structure necessary to be an effective counterpart institution, but it does have the basic structural requirements upon which to build.

SUMMARY

A subjective review of the institutional framework in the tourism sector in Delaware suggests potentials not yet realized. On the public side, State agencies are acknowledging that tourism development involves more than a promotional program, and they are recognizing that unilateral decisions on tourism issues are not always the best public policy. Private institutional involvement in tourism is for the most part at an early state of growth. Under State leadership, the private and public sectors now come together to discuss common problems and look to the future. A strong State commitment to tourism development might stimulate a comparably strong thrust among private institutions.

POLICY ALTERNATIVES

In this section, major structural policy alternatives will be considered. The first alternative is to maintain the status quo. The other alternatives are not mutually exclusive; they could be adapted singly or in combination or in parts, depending on judgment as to the amount of support that is justified for tourism. Essentially these latter alternatives reflect the three basic conclusions stated earlier, that, as a matter of policy, tourism's contribution to Delaware's economy should be protected; that special efforts should be made to exploit strategic marketing opportunities in each county and that continual development of seasonal homes should be encouraged.

STATUS QUO

A "status quo" policy toward tourism would mean no change in the subsistence level of tourism promotion in the State Travel Service. Other issues would be resolved as they have been in the past, and public and private institutions would operate as they have in the past. The immediate benefit of a status quo policy would be a minimum expenditure of State funds. Problems would include:

1. A risk that Delaware would lose its quality markets to more promotion and development-minded neighbors, leaving Delaware with a higher proportion of day visitors.

2. A risk that development of attractions and a healthy tourism plant in each county would be slowed due to lack of State leadership and support for local projects.

3. A risk that because Delaware's natural and cultural resources would continue to be under-utilized, there would be little interest in their development.

INCREASED PROMOTION

The promotional budget level readily characterizes the overall commitment of the State to the support of tourism development. A policy of increased promotion must be given top priority for consideration because of the extremely low current level. Like promotional support for other consumer products, there is no absolute right or wrong budget level for a State tourism promotional program. There are, however, guidelines that set the parameters of reasonableness: one is consistency with the competitive situation; another is consistency with a relevant revenue source.

Funding Guidelines

Competitive Spending

Delaware in FY 1979 spent the least on tourism promotion of any state or territory in the U.S. -- $77,000. Table 39 shows per capita promotion expenditures for other states in the eastern U.S. which also have good tourism assets and comparable opportunities to tap the concentrated eastern tourism

markets. Although the per capita measure of expenditures may not lead to valid comparisons in all analyses, it is a useful way to gauge the level of effort from the taxpayer's point of view.

It is seen in Table 39 that Delaware spent at the rate of only $.12 per capita, a lower rate than any of the competitive states shown. Two states with well recognized tourism campaigns, Virginia and New York, are spending at per capita rates four to five times that of Delaware, and in absolute terms, at levels beyond comparison. It must be recognized that Delaware's population is extremely low, which means that to be competitive, per capita expenditures would probably have to be on the high side. Two other states with low populations and good tourism potential, Vermont and New Hampshire, spend even more than New York and Virginia on a per capita basis, $1.01 and $.65 respectively.

Given Delaware's low population, impressive assets, and access to markets, a per capita rate of spending for tourism promotion comparable to Vermont or New Hampshire would seem reasonable. The proposed 1980 budget level of $467,000 would represent a per capita rate of $.80. If Delaware were to spend $1.00 per capita -- a reasonable proposition -- the budget would be $582,000.

Tax Revenues

Although Delaware does not have a sales tax, it does impose a six percent tax on hotel, motel and tourist home rooms. Revenues from this tax go into the State's General Fund, that is, revenues are not earmarked for tourism development. It would seem reasonable that the level of revenues derived by the State from strictly tourism sources would be related to the level of the State's spending to support and promote tourism development. Actually, the revenues generated in 1977 by the accomodations tax were $838,077, while the 1979 promotion budget was $77,000.

Proposal: $500,000 Budget Level

The guidelines make a case for a tourism promotion budget in the range of $467,000 for FY 1980 is certainly justified by this analysis. Based on the analysis, consideration could be given to a significantly higher budget level in FY 1981 to protect and increase the jobs and income generated by tourist expenditures.

Promotional Strategy

A need for two-part promotional strategy evolves from the foregoing analysis of markets and marketing opportunities:

1. A State campaign -- a competitive, image-building campaign for the State as a whole to protect current tourism revenues, to provide a backdrop for local promotional efforts, and to stimulate additional capital investment in tourism facilities.

TABLE 39

PER CAPITA TOURISM PROGRAM EXPENDITURES SELECTED STATES

1978-79 BUDGETS

State	1978-79 Budget ($000)	Rank (52 Total)[1]	1977 Population (000)	Expenditure Per Capita
Delaware	$ 77[2]	52	582	$ .12
Maine	185[3]	N/A	1,085	.17
Vermont	490	44	483	1.01
New Hampshire	552	41	849	.65
Maryland	805	34	4,139	.19
New Jersey	1,550	23	7,329	.21
Virginia	2,545	11	5,135	.50
Pennsylvania	2,956	7	11,785	.25
New York	10,700	1	17,924	.60
Total - 50 States	$72,491		216,332	$ .34

1 Includes U.S. Territories.

2 Actual spending; original budget figure submitted in response to USTDC survey was $125,000.

3 1977-78.

Source: U.S. Travel Data Center, Survey of State Travel Offices, 1978-79; U.S. Bureau of Census, 1977.

2. A county campaign -- a series of special promotional programs in each county on a matching fund basis to implement specific strategies for new revenues, to strengthen local institutions, and to establish linkage with the private sector.

The relative weighting of the State campaign versus the county campaign is suggested to be on a 80/20 ratio. At a budget level of $500,000, the amounts for each purpose would be $400,000 and $100,000 respectively. In the near term, it is anticipated that local promotional funds to match State funds would be in short supply.

State Campaign

The main objective of the $400,000 State campaign would be to build a desirable image for Delaware in major markets. The strategy of the State Travel Service would seem valid: promote northern Delaware in summer and winter and the shore in spring and fall; promote tourists who stay overnight in public accommodations.

Selection of markets and media in which to advertise is a complex procedure beyond the scope of this study, but it is possible to discuss general criteria. Specific recommendations ultimately will be provided by the State's advertising agency.

In the supporting documentation to the 1980 budget request, the State Travel Service targeted markets in the 200 to 350 mile range from the State, on the logic that if the visitors drove that far, they would surely stay overnight, and that was the objective.

Many who were interviewed in the course of this study identified specific markets -- Cleveland, for example, or Montreal -- which had been a known source of some tourists in the past. Their inclination was to advertise in those markets to generate additional volume.

Others who were interviewed emphasized Delaware's traditional markets -- Baltimore, Washington, Philadelphia, New York, and possibly other nearby markets such as Harrisburg. Their argument was the the size of these markets is more than adequate to saturate Delaware's facilities and attractions, that easy access and relatively high awareness of Delaware lessens the burden of persuasion, and that, with a proper approach, the overnight market objective can be fulfilled.

The debate centers on whether it is better to do an intensive advertising job in relatively few markets or to cast a large swath and reach more people with less intensity. The debate is complicated by pros and cons of available media -- regional magazines, newspapers, radio and television.

The criteria will vary by the type of tourism product being offered. The attractions of northern Delaware for example, might aim at relatively small, high-income audiences in many markets. Sussex County resorts might aim at nearby markets where easy accessibility could clinch a decision over the competition.

The ultimate decision on markets will depend in part on the amount of funds available. A low budget leaves little room for opening new markets. A higher budget permits a more flexible approach.

A strong media campaign would, of course, have to be backed up by a full range of promotional support activities such as brochures and familiarization tours for writers, tour wholesalers, etc.

County Campaign

Delaware has three counties, and, from a tourism point of view, each is a separate product requiring its own marketing strategy. In the discussion of budget, a level of $100,000 was slated for a county-by-county promotion program. Following are proposed strategies for each county. Each is tailored to the marketing opportunities identified in Chapter I and the estimates of gross promotable potential discussed earlier in this chapter.

New Castle County: In New Castle County, the main identified marketing targets are:

1. Overnight visitors during weekends all year.

2. Overnight visitors during the entire summer season.

3. Midweek conventions.

The primary attractions on which to base a strategy to attain these goals are the museums of New Castle County and nearby Pennsylvania. These museums are judged to be outstanding in quality and scale individually and, in combination, they represent a regional attraction of high magnitude.

There is no shortage of sophisticated, knowledgeable individuals in New Castle County, where tourism is an established industry. But organizationally, there is a need to bring people together in a common sense.

The museums have taken a serious step toward a joint approach by production of a brochure that promotes nine institutions[1] in the Brandywine Valley, citing the region as a center of art, history, and natural beauty. The effort has not yet gone beyond the brochure stage, however. There is no central office where more information can be obtained, nor is there a single admission pass valid in all nine museums. It is not an easy task to create a consolidated package. The museums have different appeals, they are vastly different in scale and fee structure, they are not as conveniently grouped as, for example, the museums of the Smithsonian Institution in Washington. And each is an independent entity with its own Board and operating philosophy.

The local hotels use the joint brochure for promotion of weekend visits, and the museums refer to local hotels in response to inquiries. But there remains a need for greater cooperation. One problem is that the non-profit status of the museums prevent them from working directly with individual hotels in joint promotion.

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1 Sometimes referred to as the "Brandywine Nine".

There would seem to be a real opportunity for the State to intervene in this situation as a catalytic agent, to provide professional services and financial support for a program that would link the museums and hotels in a positive way.

As a catalyst, the State could take the lead in joint planning, working out discounts in hotel rooms rates and museum fees to create the most favorable possible package. It could apply creative talents to the difficult logistic problems involved in offering a single admission ticket to all the museums and an annual pass to encourage multiple visits. Joint planning could also focus on special favors or events or other devices to help add maximum appeal to the package. Some centralized means to provide information should be organized.

It is envisaged that the package would be promoted by all participants, that is, the museums, the hotels, and the State, plus the State Chamber of Commerce and the visitors and convention bureau if it is created. The State should expect to bear a large part of the financial burden at the beginning. Conceptually, an advertising campaign in selected quality media could be the basis of the program and the main financial consideration. On the merchandising side, brochures would be needed, and all the various efforts required to insure that tour packagers throughout the East are familiar with the program.

The program would be tailored to weekends all year and the entire summer season. In the summer, particularly, it would be hoped that in the future new State visitor centers on I-95 would be important generaters for visitors.

It is also a goal to attract more conventions in New Castle County. The State could work closely with the Chamber and, if organized, a new convention and visitors bureau, toward this objective. The existence of the museums in the area is a plus in attracting conventions whose delegates will bring spouses.

The costs to the State should be no more than $50,000. The share of costs of the total program to be borne by the State, the museums and the hotels would be a matter of negotiation. Each participant would obtain direct financial benefits, and contributions to costs could be related to the magnitude of benefit.

As shown earlier in Table 37, the estimated gross promotable potential in New Castle County was calculated to be about 52,000 room-nights, 93,000 person-nights, and total expenditures in Delaware of $4,189,000. At a ratio of 4.6 percent,[1] State receipts attributable to the program would be $193,000.

The feasibility of the program can be judged by consideration of the following assumptions of utilization of the 2,834 hotel/motel rooms in New Castle County:

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1 Based on the economic analysis of State's receipts per tourist expenditure dollar in Chapter II.

1. Museum Promotion:

   Weekends all year: 2,834 rooms x 25% additional occupancy (709 rooms) x 50 nights = 35,000 room-nights

   Summer: 2,834 x 10% additional occupancy (283 rooms) x 50 nights = 14,000 room-nights.

   TOTAL = 49,000 room-nights
   176,000 museum visits[1]

2. Convention program:

   Midweek except summer: 2,834 rooms x 10% additional occupancy (28 rooms) x 150 nights = 4,000 room nights

   GRAND TOTAL = 53,000 room-nights

Kent County: Kent County presents a different situation from New Castle County. There are only about one-fourth the number of hotel rooms, and there is excess capacity in the hotels. The attractions on which to build a strategy are of a different order. Cultural attractions -- museums, historic buildings, etc. -- are of excellent quality, but are not recognized as regional or national tourist attractions. Similarly, natural attractions -- Delaware Bay, the rivers and the wetlands -- are interesting to sportsmen and naturalists, but they are not of compelling appeal to the tourist without a special objective.

With this assessment of attractions, a range of alternative strategies could be adopted by the State and county:

1. Accepting the status quo, emphasis could be on serving those tourists who appreciate the county's attributes, such as fishermen and hunters.

2. A major promotional campaign intended to build a tourism image and offset disadvantages could be mounted.

3. A strategy built on special events linked to the county's attractions could be adopted.

4. A strategy to attract seminars and other meetings to Dover could be adopted.

Given an unhealthy hotel occupancy situation and a general underutilization of resources, the status quo is difficult to accept. An objective assessment of potential does not support the idea of an expensive promotional campaign. However, it would seem reasonable and practicable to to adopt a strategy based on special events, listed third above, and a strategy based on seminars, listed fourth above, to accomplish modest objectives.

The idea of both strategies would be to draw people to Kent County and hold them overnight in local hotels. In most cases, events would be on

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1 Assuming 1.8 persons per hotel room and two museum days per room-night.

weekends and seminars would be midweek.

Events. There are already many strong events in Kent County, such as open house at Dover Air Force Base, racing at Dover Downs, and, in Milford, despite a limitation of hotel space, a weakfish tournament and a long list of annual events ranging from a home and trade show to a canoe race. Planning and organizing a continuous series of new events with sufficient scope and quality to attract overnight visitors from out-to-state will require great imagination and determination and the participation of many people. The State can play a leading role, it can use its resources to get ideas from other places, and it can provide some financial support, but success will ultimately depend on a strong joint effort with local institutions.

The scale of events should be carefully planned since there are only 792 hotel rooms in the county. Crowds of 1,000 to 1,500, requiring perhaps 350 rooms per event for overnight visitors, would be an appropriate target.

The range of potential events is almost limitless. For planning purposes, it is proposed that a program be geared to 20 events per year. It is suggested that emphasis be on small, identifiable special interest groups -- general aviation, bird watching, horses, dogs, antique cars, etc. The question is, what would it take to bring 1,000 to 1,500 special interest enthusiasts to Dover for a two-day event?

Two ideas will illustrate the concept, each tailored to local attractions:

> The popularity of jogging and bicycling is well noted. As a group, participants in these activities appear to be highly motivated and rather affluent. A monthly two-day Kent County run (or bicycle ride) might be offered, each time over a different route through wetlands, historic buildings and farmland. There would be a party on Saturday night and, as an incentive to stay, possibly video tapes of each participant could be shown after dinner.
>
> Secondly, the popularity of crafts, antiques, and collectibles is also well noted. Dover, with its historic background, might arrange a series of fairs or exhibitions or markets tailored to these interests. On Saturday night, as an incentive to stay over, an auction of special pieces or some special entertainment or a special early American menu in restaurants might be offered.

As a first step, an impresario should be employed to bring the program alive. This could be a State contribution to the program. The hotels and merchants and the chambers of commerce in Dover and Milford and other interested communities could help in the planning and implementation, and the State could take the lead in promotion to the various identified groups. Ideally, the direct costs for each event would be recovered from food concessions or fees or other revenue-generating features.

Seminars. A seminar strategy would be comparatively less complex. The basis of the strategy would be persuading corporations, associations, and other affiliated groups, both in-state and out-of-state, to hold their seminars, meetings, and conventions in Kent County. The groups would be small, tailored to local facilities. The selling points would be that local institutions like the Chamber of Commerce would organize tours of the capital and other local historic attractions, Delaware State College, agricultural facilities, and natural areas according to the interests of the group. These attractions would tend to determine some of the groups to be solicited -- historical societies, for example, or conservation-oriented organizations.

This program would fit into the normal sales effort of local hotels. The State and local institutions would provide leads and inquiries, help finance brochures and printed materials, and organize the supporting program while the group is in the County.

Summary. The cost to the State for the Kent County program should not be more than $25,000. The estimated gross promotable potential for Kent County is estimated to be 14,000 room-nights, 26,000 person-nights, and one million dollars in total expenditures. At 4.6 percent, State receipts would be $46,000.

If each part of the two-part strategy is equally successful, the programs might be shaped as follows:

1. Event strategy: 20 major weekend events each utilizing 350 rooms one night - 7,000 room-nights.

2. Seminar strategy: 35 midweek groups each utilizing 100 rooms two nights - 7,000 room-nights.

TOTAL = 14,000 room-nights.

Sussex County: Communities in western Sussex County could use a matching fund program to finance promotional ideas during the peak summer season. In eastern Sussex County, however, communities must deal with the classic seasonality problem of ocean resorts. Alternatives are limited. Action might include:

1. Accept the status quo; base plans on essentially a two-month crush.

2. Fight seasonality; aim for an extended season with public investments in major facilities like a convention center.

3. Compromise: concentrate on a six-month season through promotion of shoulder months.

Regarding the first alternative, the economics of the shore are geared to a two-month crush for the most part. The economics seem to be generally acceptable. New investment continues, real estate prices continue

to increase, and the communities are fiscally sound. However, the natural desire of hotels, merchants and property owners is, of course, to maximize return on their capital. An extended season would mean additional income and additional employment without additional investment.

The second alternative, which is aimed at a nine-month or even a full-year season, would be difficult to implement due to the nature of the tourism plant. Conventions would be the logical prime off-season market, but the Delaware Shore is much more oriented to seasonal homes than hotels, and hotels with full services and meeting facilities are essential to attract conventions. Sussex County has an estimated 1,687 hotel/motel rooms in about 73 establishments, or an average of about 23 rooms per establishment. Most close after the season. There are only three hotels of adequate size to promote group business, and these total less than 300 rooms together.[1] At present there is little justification for a new convention center, and therefore little basis for a major effort to extend the season substantially.

The third alternative, however, does appear feasible. There would seem to be a reasonable opportunity for the State and local shore interests to combine in an intensive promotion of the "shoulder" season, that is, May-June and September-October, to arrive at a rather solid six-month season.

It is proposed that the strategy be geared to a modest media campaign in nearby markets -- Washington, Baltimore, Philadelphia. The theme of the campaign would emphasize such elements as the beauty of the shore in the off-season, the opportunity for uncrowded recreation -- walking, running, bicycling, golfing, sailing, tennis, etc. -- and low prices in hotels and restaurants. The media campaign would be backed up by appropriate brochures and promotional efforts.

In the longer term, a major public investment in an indoor pool and a major indoor recreation facility with possibly ice skating, tennis, racquet ball, squash, and other activities.

It is recognized that the typical shore family market is ruled out in midweek periods in the off-season by school schedules, and that motivation to visit the shore in the off-season is generally rather weak. But recreation has risen to be of such a high esteem in so many lives that the opportunity to enjoy it without a hassle in good weather at the shore may be a sufficient attraction.

Financial participants in the program should reasonably include all beneficiaries, that is, the State, the local communities, local chambers or other promotional institutions, and hotel and restaurant operators. Costs to the State should be held to $25,000. The estimated gross promotable potential is estimated to be 31,000 room-nights, 62,000 person-nights and $2,463,000 in total expenditures. At 4.6 percent, State receipts would be $113,000.

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1 Henlopen - 89 rooms; Atlantic Sands - 89 rooms; Commodore - 82 rooms.

The goals of the program stated here are not conservative but they are judged to be reasonably attainable. One uncertainty is the number of small hotels that would not stay open and participate. If the number were large, the burden to attain room-night objectives could be quite heavy on those that do participate.

Proposal: Changes in Organization

Tourism Advisory Board

If the promotional budget is increased to the $500,000 range and State and County campaigns are activated, it would be prudent to consider adding a policy-making body to the organizational structure of the State's promotional agency. The idea is to set up an advisory committee that would function like a board of directors on policy issues except that its role would be only to recommend, not decide. The proposal is intended to provide for accountability to the Legislature to insure proper use of funds and also to provide professional review of technical questions such as those raised above, that is, media strategy, market selection, matching funds, etc.

Implementation could take many forms:

1. A new body could be created for this purpose.

2. The life of the Tourism Advisory Board (TAB) could be extended with a broader mandate.

3. The Delaware Travel Council could be utilized for this purpose.

Without regard for possible political factors, either of the latter two alternatives would seem both straightforward and practicable, and creation of a new body would not seem necessary. The TAB includes representatives of both the public and private sectors, which could be useful to coordination with other State agencies. The Delaware Travel Council would provide strong representation of the private sector.

On balance, the TAB would seem to be the better choice for a policy-review body because of its broad representation, and this change is proposed. The Travel Council could ultimately have an equally strong but separate role as a promotional private sector counterpart to the State agency for joint Statewide promotion.

Division of Tourism

With a competitive budget and a broad-based advisory board, tourism promotion would warrant more recognition within the State government. A dramatic change would not seem advisable, such as moving to another Cabinet Department, since the program orientation would continue to be consistent with the goals of the Department of Community Affairs and Economic Development. But elevation of the State Travel Service from a functional agency within the Division of Economic Development to full "Division" status within the Department would seem fitting and logical and responsive to the needs for orderly tourism development, and this change is proposed.

A new organization chart incorporating these changes is shown in Figure 1. The Division of Tourism would thus fit into the following roster of functional agencies within the Department of Community Affairs and Economic Development:

Department of Community Affairs and Economic Development
- Division of Consumer Affairs
- Division of Economic Development
- Governor's Special Assistant for Urban Affairs
- Governor's Special Assistant for Industrial Development
- Division of Housing
- Division of Libraries
- Office of Economic Opportunity
- Office of Human Relations
- Office of Minority Business Enterprise
- Division of Tourism

INCREASED OVERALL CONCERN

While increased promotion is the most obvious and clearcut way the State could express a commitment to tourism, promotion is only part of a total concept for tourism development. There is a need to consider a policy of increased overall concern for tourism development. Tourism is characterized by a myriad of social, environmental and economic issues that cut across administrative and functional lines. Resolution of these issues may involve far greater State expenditures than the promotion program discussed above.

In this section, general and specific issues which affect or are affected by tourism development will be examined. The purpose is not to resolve the issues, but to demonstrate the breadth of concerns that are related to tourism and to consider whether there is a better institutional format for tourism input to government policy deliberations.

General Issues

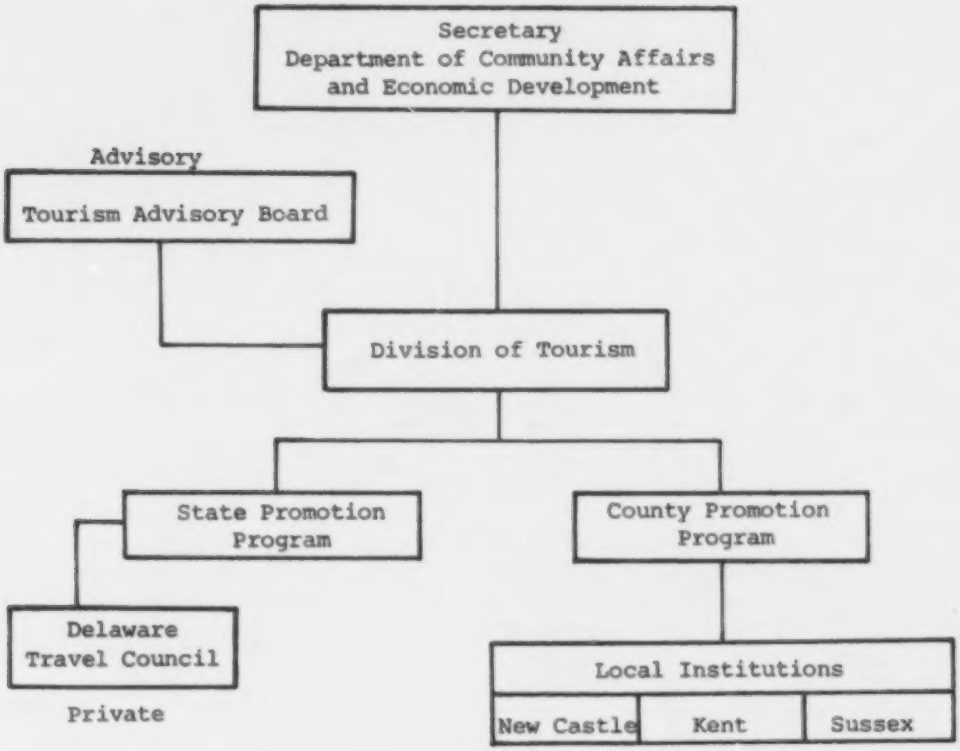
One general issue of major concern to the State is the real economic impact of tourism -- both benefits and costs. This and associated questions have been addressed in this study, and the economic analysis in Chapter II should help resolve many aspects of concern.

The two Governor's Conferences on Tourism and Recreation have identified and considered many general issues of concern to individuals and organizations who are professionally involved in tourism, such as seasonality, industry fragmentation, traffic congestion, legal restrictions, lack of coordination and cooperation, and lack of promotion budget. Many of the specific issues itemized in the following pages are related to these general concerns. Basic problems such as seasonality have shaped the proposed promotion strategies discussed earlier.

The Delaware Tommorrow Commission looked to the future into subject areas not usually immediately associated with tourism, but which are of serious consequence to tourism development, specifically, land use planning and regulation,

FIGURE 1

PROPOSED NEW ORGANIZATION CHART FOR STATE TOURISM ACTIVITIES



conservation, open space, wetlands, farmland, transportation and community development. All of these subjects are of great concern throughout the State and particularly in regard to future development of the shore area in Sussex County.

Special Issues

Whereas general issues are seldom resolved clearly as single entities, there are many specific issues that must be resolved and which affect tourism policy directly. Following is a list of 23 specific issues in which tourism is a component. These were identified in prior studies and conferences such as those discussed above, and also in interviews with individuals and organizations in the course of this study. Requirements for decision-making and implementation vary with the issue. The key questions from a tourism development standpoint are, who, if anyone, is providing the tourism input and, is there a better more cohesive way to do it?

Statewide

1. Sales Tax

A sales tax is paid directly by the tourist and and is an effective way to increase State receipts from tourism. This point is made while recognizing that State tax policy is a broad, all-encompassing issue and that some tourist shopping is generated by the lack of sales tax.

2. Accomodations Tax

The logic of linking the tourism promotion budget, either conceptually or literally, with the revenues generated by the accomodations tax has been discussed. Certainly the tourism industry has an incentive to reiterate this argument.

3. Gambling

Whether casino gambling would be good for Delaware is an oft-repeated question. A study of economic and social implications, including impact of tourism, is needed to respond to pressures both pro and con on the issue.

4. Public Land Leases

The debate over offering longer leases (say to 25 years from the current five years) to private developers to encourage investment in tourism facilities in State parks is part of a general policy issue in regard to State parks. Expanded facilities, particularly overnight accomodations, would stimulate non-resident visits, and at present many parks are underutilized. Opponents say this commercializes the parks and means little benefit to Delaware residents. A process for further airing the issue is needed.

5. Promotion of State Parks

The patterns of non-resident use of State parks at the shore create an issue whether non-resident use of the other parks not located at the shore should be promoted as a means to generate additional user fees and increase overall utilization of resources. The economic analysis in Chapter II showed that promotion of day visitors would probably not be justified. If overnight facilities are needed, this issue becomes linked with the issue of long-term leases discussed above. The economic feasibility of overnight accomodations in most parks appears to be marginal. There is a need for further analysis of the objectives of the Division of Parks and Recreation and the Division of Economic Development.

New Castle County

1. Convention Center

There is a desire in some quarters for a convention center in New Castle County to help strengthen the tourism industry there. The market

analysis in Chapter I indicates only limited available hotel capacity in midweek periods, assuming that the slack created by the opening of the Radisson will soon be taken up. The feasibility of a convention center, therefore, would seem to be linked to potential for investment in new hotels in central locations that would be part of a convention package. A detailed feasibility study and a means to promote investment in hotels are needed.

7. Jai-alai

Proposals have been made to install a jai-alai fronton in downtown Wilmington. It is expected that the facility would generate demand for new hotel rooms. Means for the State to study the feasibility of the project and, if favorable, to facilitate private investment are needed.

8. Theme Park

There is also interest in some quarters in a theme park in New Castle County. There are many potential pluses in having a major revenue-generating facility in the county that would draw substantially from out-of-state. There are also many potential negatives, particularly traffic congestion and financial risks. Like a convention center and jai-alai, this proposal requires in-depth professional analysis before the State can take a position on whether to encourage or discourage investment.

Kent County

9. Wetland Legislation

Although wetlands legislation is a statewide issue, it is discussed under Kent County since the extensive wetlands on Delaware Bay are a major natural resource for the county. Of particular concern are the restrictions on land-fill that constrain development of launching ramps and marinas. It is important that deliberations on this issue take account of the economic implications of tourism facilities and the social benefits of expanded recreation resources.

10. Marine Recreation

The Governor's Task Force on Marine Recreation is proceeding to examine the potentials for marine recreation. There are needs for launching ramps and marinas to develop marine-oriented tourism, and also needs to enhance natural resources -- like scrap tire artificial reefs to increase the fish supply. A permanent link between recreation and tourism interests in marine recreation is needed.

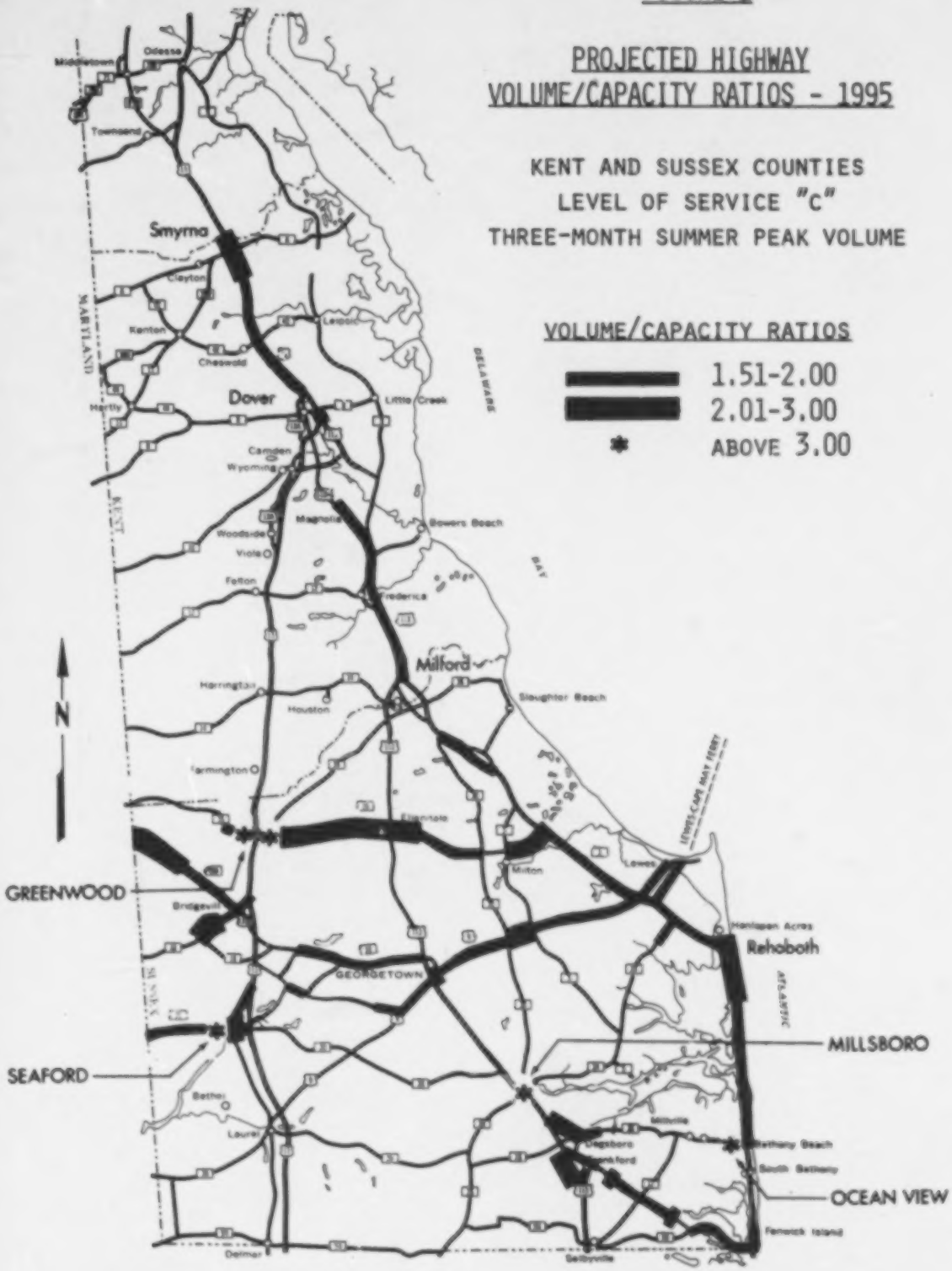
11. Bicycle Pathways

As seen in Chapter I, a major need for new bike trails has been identified in the SCORP. The issue is discussed under Kent County because of the particular need in this county to provide attractions for specialized markets. There would seem to be real justification for

FIGURE 2

PROJECTED HIGHWAY VOLUME/CAPACITY RATIOS - 1995

KENT AND SUSSEX COUNTIES
LEVEL OF SERVICE "C"
THREE-MONTH SUMMER PEAK VOLUME



Prepared by the Delaware Department of Transportation, Division of Highways, Office of Planning. Based upon projected land use data provided by the Office of Management, Budget and Planning (OMBP). A

advocacy of bicycling as a recreational resource. If bicycling is adopted as an integral part of a promotion program in Kent County, the economic benefits might help accelerate the bike trail program.

12. U.S. 113

The last unfinished section in the dual highway from Dover to Rehoboth is near Dover Air Force Base on U.S. 113. There is logical argument to finish this section. However, the economic analysis of Chapter II reveals that highway costs attributable to tourists are a severe burden on the State, especially highways designed for peak seasonal tourism traffic. The Division of Highways and the Division of Economic Development each employ advanced techniques of evaluation, and further work should be done. Possibly public debates will ultimately be required to ventilate this multi-million dollar issue.

13. Local Museums

If an active event-oriented promotion program is initiated in Kent County, the State museums and historic buildings will be important elements. It is in the interest of the proposed Division of Tourism to help upgrade and consolidate museums and attractions, and, conceptually, it would be appropriate to contribute funds on a matching basis toward that objective, assuming a full-scale budget for the Division of Tourism is approved.

Sussex County

14. Highways

The Division of Highways has developed a methodology to forecast future congestion at certain places at certain times if present highway conditions and trends in traffic volume remain unchanged. This methodology was applied to Sussex and Kent Counties, and the results are shown in Figure 2, "Projected Highway/Capacity Ratios -- 1995". It is seen that in 1990 some highways will be at 1.5, 2.0, and some at three times design capacity at peak tourism periods during the summer, that is, traffic volume will be double or triple the capacity of the highways. These are intolerable levels. The forecast is a pessimistic scenario, but at the present time construction of new highways or devices to alleviate the situation is not planned since the only justification is tourism peak traffic at a limited number of times during the year.

A big problem is in the east-west direction, particularly the southern east-west connections to Bethany, Fenwick Island, and Ocean City. The Division of Highways has drawn plans for a dual highway from Dagsboro to Fenwick Island which would relieve congestion, but it can only be justified by tourism peak periods, and to date it has not been judged economically feasible. The Division of Highways, the Sussex County Planning Commission, the Department of Natural Resources and Environmental Control, the Department of Community Affairs and Economic Development and others who are involved need a forum for resolving the total question. A comprehensive tourism development plan for the area would be one part of the ultimate solution.

15. Sewers

The need for a comprehensive development plan for the shore area also holds true for sewers, which are a most essential element of development planning. A revised plan for a new sewer system in Rehoboth is moving forward. Septic tanks are still the prevalent method elsewhere. There is a need to review technology and overall development potentials to maximize the shore as a tourism resource with minimal adverse environmental impact.

16. Coastal Road

Prior studies have proposed a new concept for the coastal road from Rehoboth to Bethany: it would be converted to a low-speed toll road (like the Skyline Drive in Virginia) as part of the contiguous State park that now exists on both sides of Indian River Inlet. The proposal fs interesting in that it would enhance the park areas, providing more unity, and it would reduce traffic congestion on the coastal road. Negatives would be inconvenience to those traveling between Bethany and Rehoboth and possibly some loss of revenues to merchants. There are many implications that should be weighed in a comprehensive tourism plan.

17. Mobile Home Communities

In the area behind the bays at the shore , there are an increasing number of mobile home communities, some permanent and some seasonal. They are approved by the County since they represent affordable housing in an otherwise expensive area. The problem is that unplanned proliferation of these communities diminishes opportunities for development on a higher economic scale. A plan for the area could protect opportunities for low-cost housing and mobile home communities without adverse effect on other investment.

18. High Rise Development

There is little beachfront land left in private hands, and there is a logical desire among the owners to obtain good financial return from development. Conflicts can be anticipated between developers, local residents, the County and the State as each assesses his own balance between costs and benefits. A plan respecting legal, social, and economic points of view might help resolve future issues with minimal strain and dissension.

19. Burton's Island

The State plans to develop Burton's Island as a recreational area, consistent with demand for marine recreation (Burton's Island is just behind the north side of Indian River Inlet). Opponents seek to preserve the island in its natural state and protect wildlife. Economics play a role in this issue, though not a primary one. A plan is needed to balance economic, social and environmental values on a regional basis.

20. Historical Areas

The historic areas of Lewes and Milford have potential as tourist attractions for shore visitors that could benefit the local communities through urban improvement and fees. Nearby resort areas would benefit by having a cultural attraction to enhance the overall appeal of the Delaware Shore. The State would benefit through enrichment of the cultural heritage and strengthening of the tourism plant. There is a need for a mechanism to channel tourism promotion funds to projects with this kind of regional impact.

21. Beach Fees

Beach fees are a perennial proposal in Rehoboth Beach as a means to keep down the volume of low-spending day visitors. However, the loss of freedom of all visitors to the beach, plus problems of instituting physical restraints and means of enforcement, suggest that rigid controls and fees are not the answers. Possibly the only answer is an active promotion program aimed at overnight visitor markets, that is, a policy of accepting day visitors but not seeking them.

22. Golf

The Sussex County Planning Commission has identified a need for new golf courses in the shore area, targeting one to the north of Rehoboth Beach oriented to Rehoboth Beach and one to the south oriented to Bethany Beach. On the face, the benefits to the area are apparent -- particularly since they would contribute to extending the tourist season. The approach has been to promote an investment by private interests. Another approach, adopted by Harwich, Massachusetts on Cape Cod, for example, was to build a golf course as a municipal venture. Reportedly, the investment has been successful and the community not only benefits from increased tourism but also from direct revenues from the golf course. In Delaware, there is a need for an agency of local or State government to take the initiative in promoting tourism investments such as this.

23. Pest Control

In Sussex County and elsewhere south of the Chesapeake and Delaware (C&D) Canal, there is a general problem of pests that adversely affects development. It is important that the economic implications be recognized and that a strong pest control program be maintained.

Proposal: A State Tourism Planning and Development Agency

These brief comments on the multiple issues that are currently matters of concern in Delaware lead to a conclusion that there is a need for a new planning and development agency in the tourism sector. Otherwise, the risk is that potential tourism impact would be underestimated or ignored in public policy decisions wherever they would take place in government.

It is proposed that the State give consideration to creating a new State Tourism Planning and Development Agency. The agency would have the following basic functions:

Planning

1. It must be responsible for a statewide tourism plan and specific regional plans such as a plan for the shore area.

2. It would have prepared feasibility studies of projects in the State's interest -- such as a convention center or golf course -- on its own initiative.

3. It would work closely with local interests in each county on planning and investment projects -- such as development of historic properties or bicycle trails -- to maximize tourism potential of the project.

4. It would work closely with private interests to encourage study and investment in new tourism projects.

5. It would work closely with other State agencies to provide a tourism input to their planning -- such as highways, or recreation facilities.

6. It would provide data to legislators in support of Division of Tourism recommendations.

Development

1. It would be responsible for promotion of private investment in projects deemed to be in the public interest. It would facilitate approvals and support of appropriate investment projects by other Government agencies.

2. As an optional power, it could have funds to invest in certain public projects on a matching basis to accelerate their implementation.

3. As an optional power, it could have funds to loan private investors for tourism projects that are judged to be in the public interest.

The proposed agency would fill a void by providing a planning input into non-promotional aspects of tourism development. The diversity and importance of the several issues discussed above suggests that a cohesive tourism planning point of view could make a positive contribution to the decision-making process.

The development program includes promotion of investments in the private sector that would strengthen Delaware's tourism plant. The program also includes two optional development funds. These funds would clearly make a contribution, but more study is required to evaluate their need and overall efficacy. The concept is that an agency with modest funds for dispersal to other public institutions or private investors would have substantially more influence in the process of development of the projects being implemented.

Notionally, the development fund for local public projects might be started with $500,000, and a similar amount, $500,000, is seen to be an adequate base for a loan fund to private interests. In both cases, only small projects that could benefit from an infusion of, say, less than $50,000 would be appropriate.

As to how the proposed agency would be placed in government, there are several options. Two are shown in Figure 3. Each builds on the proposal presented earlier that tourism promotion would be elevated to Division status in the Department of Community Affairs and Economic Development.

In Option 1, all tourism activities would be integrated in the Division of Tourism. The Promotion Agency and Planning and Development Agency would balance each other. The advantage of this structure would be concentration of tourism know-how in one agency and a mutually supportive staff system.

In Option 2, the planning and development function would be taken by a new Interagency Council under the Office of the Governor. Tourism promotion would remain in its original position in the Department of Community Affairs and Economic Development. The advantage would be the power that is derived from being part of the Governor's Office and the clear recognition that tourism is a multi-agency, interdisciplinary activity.

Without the two Development Funds, notionally set at $500,000 each, the cost to establish a planning function and development should be in the $100-200,000 range. Staff would include a director, a secretary, an economist and a physical planner. Direct costs would include an amount -- say $50,000 -- for contract feasibility studies of new projects.

A MAJOR NEW CONCEPT

The emphasis in the preceding proposals for increased promotion and increased overall concern for tourism development has been on the visitor who stays overnight in public accommodations. Specific promotional priority has been on hotels and motels, which are geared to tie-in to promotional activities and to accommodate short-term guests, and the economic return per visitor day is greatest. The proposed strategies were designed to attain the estimated gross promotable potential seen in Table 36.

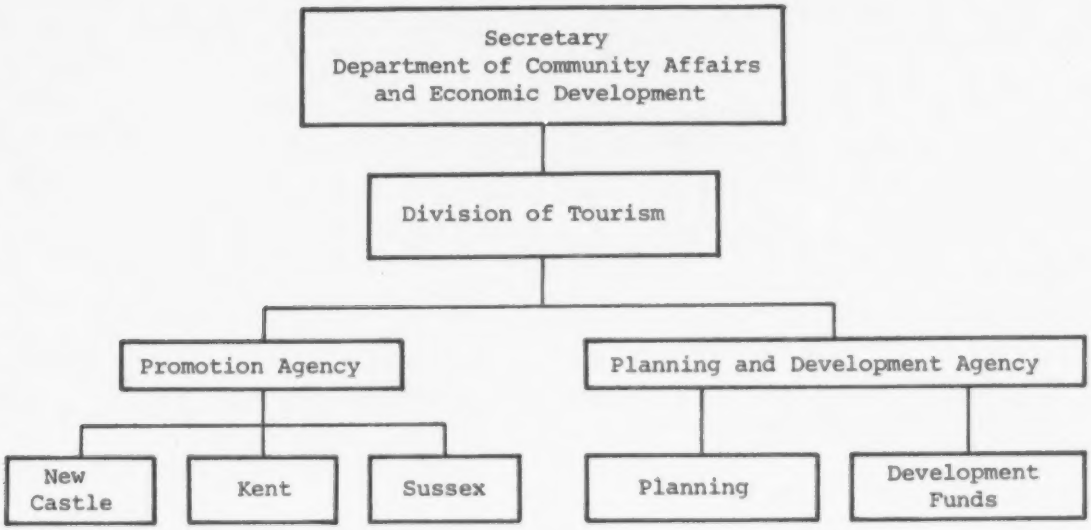
However, the bulk of Delaware's tourism plant is in seasonal homes -- an estimated 7,000 homes, and about 14,000 bedrooms, virtually all of which are located at the shore in Sussex County, compared with about 4,000 hotel and motel units in all of Delaware and about 1,400 hotel rooms in Sussex County. The average daily expenditure per person staying in a seasonal home is estimated to be $25 (see Chapter II) compared with an average daily expenditure per person of $40 for tourists in hotels.

Statewide, the number of hotels and motels will grow with the economy. In the shore area, there will also be some new motels to meet demand, but potential is limited due to the economic constraints created by seasonality. Hotel investors require a good return on their capital.

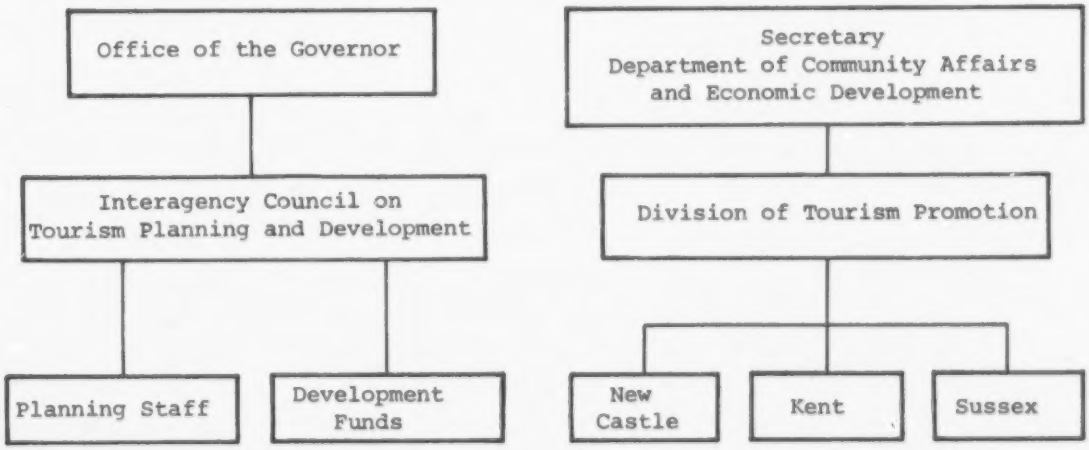
FIGURE 3

OPTIONS FOR PLACEMENT IN GOVERNMENT
OF NEW TOURISM PLANNING AND DEVELOPMENT AGENCY

OPTION 1: A SECTION OF THE DIVISION OF TOURISM



OPTION 2: AN INTERAGENCY COUNCIL IN THE GOVERNOR'S OFFICE



Seasonal homes offered for rent, however, need not stand the same test of profitability as hotels. Owners usually expect to rent their homes only in peak periods and at a price that will offset mortgage payments, taxes and maintenance. In most cases, they do not expect a "return on investment" in the same sense as a professional investor in hotels. Before and after the peak season, the owner often uses his home for weekends, providing a reasonably stable off-season population. Seasonality is not really a problem for seasonal cottages and condominiums. Seasonal homes do not require off-season employment, which makes them compatible with general seasonal labor patterns at the shore.

As was seen during the recent period of overbuilding at the shore, the market for seasonal homes fluctuates and, like all real estate ventures, there are risks for developers. But when the basic economy is reasonably strong, there seems to be steady demand to purchase seasonal homes in the shore area. The demand to rent seasonal homes is traditionally greater than the supply during the summer season.

If Delaware is to expand revenues generated by tourism in the State by significant amounts, there must be a significant increase in overnight facilities. There appears to be more potential to accomplish this objective with seasonal homes than with hotels and motels.

Development Alternatives in Sussex County

The shore area of Sussex County, unlike the rest of Delaware, is dominated by tourism. In this area there is concern about too much tourism, or the wrong kind, as well as concern to increase business. Because of the pressures caused by tourism, there is general concern at the local, county and State level as to what development policy should be.

Following is a distillation of three development policy alternatives:

1. Accept limited growth; anticipate that land oriented to water and serviced with utilities will at some point be saturated.

2. Change policy to allow high density development in Rehoboth Beach and other shore communities.

3. Adopt a policy to encourage development of seasonal homes in the area back of the bays as the next wave of growth and prepare to provide the necessary infrastructure.

The first alternative, limited growth, is a reasonable approach if it is the will of the people and the State income associated with tourism growth can be captured elsewhere or be borne in higher taxes.

There is little evidence that the residents of the shore communities would choose the second alternative, that is, to make a drastic change from a low-density to a high-density policy. If this approach were followed, there is the risk of damaging the character of the Delaware shore area and losing its market.

The third alternative, focus on the so-called "back bay" area behind Rehoboth, Indian River and Little Assawoman Bays, appears to be a logical outgrowth of this analysis. There are only 20 miles of beachfront on the ocean, but there are 120 miles of waterfront on the bays and comparatively much more land to work with.

There are many questions. Would there be a market for bay waterfront communities, or would the traditional preference to be near the ocean negate the potential of the bays? Could sewers, roads, and other services be provided efficiently, or would sprawl and injudicious use of farmland result from a development policy? Would environmental protection of the wetlands in the area mean, in effect, that development potential is diminished or prevented on waterfront property? Has the proliferation of existing mobile home communities limited the opportunity to foster development of more expensive seasonal home communities? How could development of the back bay be linked to ocean-based recreation to maximize appeal to visitors?

Proposal: Large-Scale Seasonal Home Communities in Back Bay Area

On the premise that studies will show that a market does exist, that services could be provided, and that other questions could be answered positively, it is proposed that the State consider embarking on a major new concept: large-scale development of seasonal home communities in the back bay area.

Alternative Approaches

The scale of the development concept must be large to justify a minimum scale of infrastructure and also to justify the State's involvement in planning. There are several ways the State and County could approach the goal. Following are two basic alternatives:

1. Traditional Approach

   The State could adopt a standard public sector approach, which could well be effective: preparation of a development plan; passage of appropriate legislation; promotion of the area among private land developers; facilitation of government approvals; agreement to provide infrastructure to approved projects. The problem is that initiative for development is transferred to private development at an early stage and there is risk that nothing will happen or that there will be only marginal compliance with the State's guidelines.

2. New State Development Authority

   The second alternative would employ a new public development authority or corporation to accomplish State objectives. The authority would be responsible for preparation of development plans; passage of appropriate legislation; financing of State authority; purchase of selected land tracts; provision of sewers and other infrastructure; provision of recreation amenities; bulk sale of sites within tracts to private developers for construction of seasonal homes. One main advantage would be that the State controls the development of the land up to the point of actual home construction. There is more assurance that development will actually take place as planned according to

schedule. Also, the State will benefit financially from the appreciation of the value of the land. It is expected that the authority would issue bonds, manage assets, generate revenues and be financially self-sustaining.

In both alternatives, the homes would be built by private developers, but in the second alternative, the private developers' risks are lessened since all government approvals would be obtained and all utilities and roads would be provided by the State authority. Possible disadvantages of the second alternative are the political and philosophical questions as to whether it is proper for the State to participate directly in a land development project of this nature. There are precedents for a tourism development authority. Lake Lanier in Georgia and FONATUR in Mexico, which developed Cancun and Istapa, are two examples. More generally, there are many precedents for the authority approach to achieve public objectives. New York State, for example, has 31 public authorities.

Scale of Development

To provide a basis for further consideration of this proposed concept, the following data illustrate the scale of development envisaged:

Number of Development Tracts	3
Number of acres in each Development Tract	1,000[1]
Total Acres to be required	3,000
Density (Number of Units per Acre)	3
Total Units	9,000
Total Population, Peak Day @ 3.3 People per Unit Average	30,000
Total Number of Visitor-days @ 60-day Season	1.8 million
Total Expenditures @ $25 Average Daily Expenditure per Person (1979 Prices)	$45 million
Annual State Receipts @ 4.6 Percent of Total Tourist Expenditures	$2.07 million
Cost of land acquisition @ $1,000 to $1,500 per Acre	$3-4.5 million

1 Final size of project and number of units will be affected by minimum scale of sewage treatment plants available at the time.

First Step

As a first step, a comprehensive feasibility study would be required to refine the concept and tailor it to Delaware's requirements. Every aspect of the proposal should be checked to insure economic, financial, and technical feasibility. The study should serve as a development plan. It should analyze markets and forecast absorption, establish scale and phasing, identify potential tracts for acquisition, estimate land acquisition and infrastructure costs, identify development problems, estimate potential sales prives of land, determine the best approach for the State to optimize benefits over costs, and draft appropriate legislation. Consideration should be given to the practicalities of land acquisition to insure a fair treatment for all concerned and to minimize land speculation.

CHAPTER IV: MONITORING TOURISM DEVELOPMENT

INTRODUCTION

It is important for the State to develop and maintain a comprehensive, continuous system for monitoring tourism-related developments in Delaware. If the State adopts some or all of the policy recommendations discussed in Chapter III, public officials will need to measure the impact of changes on tourism in Delaware, to determine how beneficial these programs are. If the State opts for maintaining the status quo, it should still monitor the travel sector as an important component of the State economy.

During the course of this study, the study team identified a number of data sources that could comprise a Tourism Monitoring System (TMS). These data are readily accessible to State personnel, and require little or no costs in terms of data gathering and processing. They are discussed in the following three sections, based on whether they measure developments in private tourism sector demand, use of State resources and facilities, or changes in tourism markets.

TOURISM DEMAND IN THE PRIVATE SECTOR

As discussed in Chapter II, those visitors spending the night in hotels, motels and motor hotels spend more per person-day than other types of visitors, and return more to the State in terms of revenue. The demand for commercial lodging, virtually all emanating from non-resident travelers, can be monitored on a monthly and regional basis by gathering occupancy figures from a representative sample of lodging properties in the State. Commercial lodging proprietors keep detailed records on their occupancy rates, or the percent of total rooms available for the sale that are actually sold each night, and they should be willing to share this information on a confidential basis. Coupled with data on the total number of rooms available each month, based on the information in Appendix A plus rooms added or deleted as new properties are opened and old ones closed, the occupancy series can indicate changes in the demand for commercial lodging on a regular basis.

To monitor the results of campaigns to increase convention business, lodging demand during shoulder seasons, and weekend demand, this component of the TMS can be further refined to gather information on convention, weekly, and daily lodging demand.

There is relatively little information available on seasonal home rentals, the predominant share of the lodging inventory in Sussex County. However, the Town of Bethany Beach does levy a fixed license tax on all rooms available for rent (including commercial facilities, condominiums, and detached houses) and a sales tax on the revenue from these rentals. While the payment schedule does not suit this source for seasonal or intra-week business monitoring, gathering these data annually provides a fair barometer of seasonal home demand.

The State levies accomodations tax on the rental charge for transient lodging in hotels, motels and tourist homes, and mercantile tax on restaurant retailer gross receipts. Tracking these State receipts can provide sound information on lodging and restaurant receipts on an annual, statewide basis, at least. Depending on the payment schedule and detail in the Department of Finance records, these data may also provide information on seasonal and regional trends in business.

Museums, attractions and other tourist-oriented facilities of this kind that require paid admission keep regular records on attendance. By gathering data, the State can monitor changes in this sector of the private travel industry. The study team's experience in this area, although primarily limited to State museums and those in the Brandywine Valley (the "Brandywine Nine"), indicates that these facilities will share seasonal attendance data.

The Delaware Department of Labor gathers quarterly information on the employment and payroll of businesses covered by the Delaware Unemployment Compensation Law. Federal law requires that all businesses with one or more employees must be covered by State programs, with the exception of those in agricultural production and government agencies. In 1977, State unemployment insurance programs covered 93 percent of total non-agricultural payroll employment.[1] Consequently, these

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1 Economic Report of the President, January, 1979, U.S. Government Printing Office, pp. 221-222.

data fairly represent private sector employment. Payroll and employment data, by county and quarter of the year, can be obtained from the Department of Labor for the SIC categories listed in Chapter II, Table 18. This will indicate the changes in employment and wage/salary income in tourism over time.

These data series indicate total business receipts, employment and payroll of the visitor-related businesses in Delaware. While virtually all commercial lodging room receipts are from non-resident visitors, this cannot be said of restaurant receipts, gasoline service station sales, or amusement and recreation service revenue. The U.S. Travel Data Center's annual estimates of traveler spending in each state, and the employment, payroll and tax revenue they generated, can be an important supplement to the above mentioned series. The Data Center estimates can indicate whether tourism is comprising a rising or falling share of business for individual types of private sector establishments.

STATE FACILITY AND RESOURCE USAGE

The State can also directly monitor changing visitor demand for its museums, its parks and recreation areas, its wildlife resources, and its highways. Information readily available on an annual basis include attendance at State museums, visitation at individual parks from the Division of Parks and Recreation, non-resident hunting and fishing permit sales, and non-resident boat registration from the Division of Fish and Wildlife. The parks attendance figures are available by facility and by month, allowing seasonal and regional trends to be charted.[1]

The Delaware Division of Highways counts the number of vehicles on streets and roads on a continuing basis. Monitoring vehicle counts on major tourism roads, such as Interstate 95 and Delaware Route 1, can indicate the monthly change in visitor highway usage in general terms.

The Cape May-Lewes Ferry and the Delaware Memorial Bridge are heavily used by non-resident travelers, and vehicle counts are readily available on a monthly or even daily basis from these facilities. While these sources can only generally indicate tourism trends since they include significant amounts of resident traffic, they are an important augment to other data in the TMS.

DELAWARE'S TOURISM MARKETS

It is also useful to monitor trends in the type of Delaware visitor over time, in terms of demographic and trip characteristics. As indicated in Chapter I, information is regularly gathered by State museums and a number of Brandywine Valley attractions on the origin of visitors, by facility and by month. At least two of the Brandywine facilities periodically survey visitors for demographic and other information as well. The State should encourage this data collection, and monitor the results to determine how the visitor market may be changing.

The U.S. Census Bureau's quinquennial National Travel Survey, used extensively in the analysis in Chapter I and II, also provides sound, detailed information

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2 Periodic updating the 1975 survey of State park users (see Chapter I, Table 12) is recommended as indicating the changing composition of resident versus non-resident usage.

on Delaware's tourism markets. However, experience has shown these data are gathered only in years ending in a 2 or a 7, and have been published up to 18 months after the survey period. Consequently, they may be useful only as benchmarks for other elements of the TMS, particularly on market characteristics. The U.S. Travel Data Center conducts a monthly survey of U.S. travel activity, and this can be a valuable source of current market information, especially if the sample size, currently 1,000 interviews per month, is expanded.

Finally, if the State tourism development effort is expanded, it will generate additional inquiries from potential visitors. While this sample may not accurately reflect the universe of all non-resident travelers in the State, it can indicate changes in the market over time. This would require sending mail questionnaires to a sample of those writing for travel information and processing the results.

SUMMARY

It is essential that the State monitor trends in tourism in the public and private sectors. A comprehensive Tourism Monitoring System (TMS) is recommended, providing annual and monthly, regional and statewide data on changes in tourism-related business, usage of State facilities and services by visitors, and the compositions of the Delaware tourism market. The data comprising the TMS are readily available, and can be analyzed with little additional cost to the State. The return, however, can be substantial, allowing Delaware to evaluate its tourism development programs and policies, identify problem areas such as the impact of gasoline shortages, and determine future strategies to maximize the net contribution of tourism to the State economy.

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I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
NEW CASTLE COUNTY								
Middletown								
Old St. Anne's Episcopal Church[H]	X			Free	Su	Morning Service	June-Aug	
Newark								
Cooch's Bridge Historic District[H]				Free	Appt Only		Oct-May	
Iron Hill Museum				Free	T&TH, Su	7-9p, 1-5p	YR	
Old Welsh Tract Baptist Church[H]				Free	7	Daylight Hrs (Grounds)	YR	
New Castle								
Amstel House Museum[H]	X	X	***	$1.00	W-S, Su	11a-4p, 1-4p	YR	
George Read II House[H]	X	X	****	$2.00	T-S, Su	10a-5p, 1-5p	YR	
Immanuel Episcopal Church[H]	X		**	Free	7	Daylight Hrs	YR	
Old Presbyterian Church[H]	X		**	Free	7	10a-5p	YR	

KEY

H - Listed in National Register of Historic Places, either individually or as part of an historic district
TA - Tickets Available
AC - Admission Charge

I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Odessa								
Appoquinimink Friends Meeting House[H]			*	Free	Su	Weekly Meeting	YR	
Brick Hotel[H]				Free	7	All Day (Drive by)	YR	
Corbit-Sharp House[H]	X	X	****	$1.50	T-S, Su	10a-5p, 2-5p	YR	
Janvier Stable			*	Free	7	All Day (Drive by)	YR	
Old Drawyers Presbyterian Church[H]			*	Free	7	Daylight Hrs (Grounds)	YR	
Wilson-Warner House	X	X	***	$1.50	T-S, Su	10a-5p, 2-5p	YR	
Port Penn								
Port Penn Museum				AC	S&Su	11a-4p	May-Nov	
Wilmington and Brandywine Hundred Area								
Delaware Art Museum	X	X	**	AC	M-S, Su	10a-5p, 1-5p	YR	31,706
Candlelight Music Theater				TA	Show Schedule	Show 8:15p	YR	
Delaware Dinner Theater				TA	Show Schedule	Show 8:15p	YR	
Friends Meeting House[H]				Free	M-F	8:30a-2p	YR	
Delaware Museum of Natural History	X	X	**	$2.00	W-S, Su	9a-4p, 1-5p	YR	26,000

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I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Wilmington and Brandywine Hundred Area (continued)								
Grand Opera House[H] tours		X	**	Free	Appt Only		YR	
Grand Opera House[H] performances				TA	Show Schedule	Show 8p	YR	
Hagley Museum & Eleutherian Mills[H]	X	X	****	AC	T-S, Su	9:30a-4:30p, 1-5p	YR	108,016
Le Grand Tier Dinner Theater			*	TA	Show Schedule		YR	
Lincoln Collection, Goodstay Center University of Delaware				Free	M	12-4p	Nov-May	
Nemours				Free	T-S, Su	9a-5p, 11a-3p	May-Nov	
Old Brandywine Academy[H]				Free	Appt Only		YR	
Old Swedes Church	X	X	***	Free	T-Su	12-4p	YR	
Old Town Hall[H]	X	X	***	Free	T-F, S	12-4p, 10a-4p	YR	30,350
Rockwood Manor[H]				AC	T-S	12:30-5p	YR	
Wilmington & Western Railroad*		X		$2.50	S&Su	12:30-3:30p	May-Oct	
H.F. du Pont House, Winterthur	X	X		AC	T-S, Su	10a-4p, 12-4p	October	
Winterthur Museum & Gardens[H]	X	X	****	AC	T-S, Su	10a-4p, 12-4p	YR	

KEY

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I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
KENT COUNTY								
Bowers Beach								
Bowers Beach Maritime Museum				Free	S&Su	11a-4p	May-Sept	
Dover								
Dover Downs				AC	Race Schedule		YR	
Dover Heritage Trail Tours		X		$2.00	Appt Only		YR	
McDowell-Collins Storehouse[H]			**	Free	M-F	10a-2p	YR	
Frederica								
Barratt's Chapel and Museum[H]	X	X	*	Free	T-S, Su	9:30a-4:30p, 1-5p	May-Sept	
Milford								
Holzmueller Gallery				Free	M-F, Su	9a-4p, 9a-1p	YR	
Old Christ Church[H]		X	**	Free	Appt Only		YR	
Parson Thorne Mansion[H]			**	Free	Appt Only		YR	

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I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
SUSSEX COUNTY								
Fenwick Island								
Fenwick Island Lighthouse*				Free	7	Daylight Hrs (Grounds)	YR	
Laurel								
Christ Church, Broadcreek[H]				Free	Su	1-4p	May-Sept	
Great Cypress Swamp				Free	7	9a-5p	YR	
Woodland Ferry[H]				Free	7	Daylight Hrs	YR	
Lewes								
Cannonball House[H] & Marine Museum[H]			**	$.75	T-S, Su	10a-5p, 1-5p	May-Sept	
Lewes Historical Society Complex[H]			***	$2.00	T-S, Su	10a-5p, 1-5p	May-Sept	
St. George's Chapel[H]				Free	Su	11a-1p	June-Aug	
Rehoboth Beach								
Funland				Free Gate	7	1p-12A	June-Oct	
Playland				Free Gate	7	10a-12A	May-Sept	

KEY

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LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Sussex County (continued)								
Rehoboth Art League Exhibit Hall				Free	T-S, Su	10a-5p, 1p-5p	YR	
Silver Dollar Arcade				Free Gate	7	10a-12A	May-Sept	
NEARBY MARYLAND, NEW JERSEY & PENNSYLVANIA								
Maryland								
Salisbury Zoo, Salisbury				Free	7	8a-8p Summer 8a-5p Winter	YR	
New Jersey								
Wheaton Village, Millville				Free	7	10a-5p	YR	
Shopping Area Glass Museum, Factory and Arcade				AC	7	10a-5p	YR	
Pennsylvania								
Brandywine Battlefield Historical Parks, Chadds Ford		X	***	Free	7	9a-5p	YR	

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I. ATTRACTIONS

A. PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Pennsylvania (continued)								
Brandywine River Museum, Chadds Ford		X	***	$1.75	7	9:30a-4:30p	YR	150,000
Brinton 1704 House, Chadds Ford			***	AC	TThSS, Appt	1-4p	May-Oct	
Ramada Inn Dinner Theater, Chadds Ford				TA	Show Schedule		YR	
Franklin Mint & Museum, Franklin Center			***	Free	M-S	9a-5p	YR	
Hillendale Museum, Kennett Square	X		**	AC	M-S	9:30a-1:30p	YR	3,200
Longwood Gardens, H Kennett Square	X	B	****	AC	7	9a-5p	YR	150,000
Stone Barn Dinner Theater Kennett Square				TA	Show Schedule		YR	
Three Little Bakers Dinner Theater, Kennett Square				TA	Show Schedule	Show-8:15p	YR	

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I. ATTRACTIONS

B. PUBLIC

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
NEW CASTLE COUNTY								
Delaware City								
Ft. Delaware, on Pea Patch Island			**	Boat Fee	W-Su	11a-6p	May-Oct	12,030
Newark								
University of Delaware								
duPont Mineral Collection		X		Free	M-F	9a-5p	YR	
"Solar One"		X		Free	W,S	7-9p, 10a-12p	YR	
Clayton Hall Conference Center				Contact Center Mgr	Appt Only		YR	
Ice Arena				AC	M-F, S&Su	3:30-9:30p, 1:30-3:30p	YR	
Art Gallery								
New Castle								
Old Courthouse[H]	X	X	***	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	15,368
Buena Vista[H]	X		*	Free	F-Su	10a-4:30p	YR	
The Green[H] (Open Space)	X	X	***	Free	7	All Day (Grounds)	YR	
Historic New Castle District[H]	X	X	****	Free	7	All Day (Grounds)	YR	
Old Dutch House Museum[H]	X	X	**	AC	T-S, Su	11a-4p, 1-4p	May-Oct	

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LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
New Castle (continued)								
New Castle and Frenchtown Railway Ticket Office[H]	X	X		Free	7	All Day (Grounds)	YR	
Odessa								
Historic Odessa District[H]	X	X	*	Free	7	All Day (Grounds)	YR	
Lum (Davies) House and Sign of the Buck Tavern[H]				Free	7	All Day (Grounds)	YR	
Stanton								
Hale-Byrnes House[H]			*	Free	Appt Only		YR	628
Wilmington and Brandywine Hundred Area								
Brandywine Park[H] and Zoo, Josephine Garden		X	*	Free	7	10a-4p	YR	
Delaware Nature Education Ctr, Ashland			*	Free	F-Su	9a-4p	YR	

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I. ATTRACTIONS

B. PUBLIC

LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Wilmington and Brandywine Hundred Areas (continued)								
Fort Christina Monument[H]	X		*	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	
Rodney Square (public square)[H]		X	*	Free	7	All Day (Grounds)	YR	
Thomas Robinson House, Claymont[H]				Free	S	1-4p	YR	
Willingtown Square (public square)			***	Free	7	All Day (Grounds)	YR	
KENT COUNTY								
Bowers Beach (South)								
Island Field Site[H] and Archaeological Museum	X		**	Free	T-S, Su Appt Only	10a-4:30p, 1:30-4:30p	Mar-Nov Dec-Feb	11,843
Dover								
Central Delaware Visitors and Convention Bureau, Central Delaware Chamber				Free	M-S	8a-4:30p	YR	
Delaware State College		X		Free	7	All Day (Grounds)	YR	
Delaware State Museum[H]	X	X	***	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	
Dover Federal Air Force Base				Free	Appt Only		YR	10,901

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LOCATION BY COUNTY AND SUB-COUNTY AREAS

FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
Kent County (continued)								
Governor's Mansion[H]			***	Free	S	2:30-4:30p, or by Appt	YR	
The Green (open space)			***	Free	7	All Day (Grounds)	YR	
Hall of Records	X	X	*	Free	M-F	8a-4:30p	YR	2,830
John Dickinson Mansion[H]	X	X	***	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	8,232
Octagonal Schoolhouse[H]		X	*	Free	S, Su	10a-4:30p, 1:30-4:30p	YR	2,206
Old State House[H]		X	***	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	9,281
Visitors' Center				Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	14,415
Milford								
Southern Delaware Tourist Information Center, Gtr. Milford Chamber				Free	M-S	9a-4:30p	YR	
Smyrna								
Allee House, Bombay Hook[H]		X	**		S&Su	10a-4:30p	YR	1,207
Lindens[H] & Plank House		X		Free	Daily	10a-4:30p	YR	10,901
Site of Duck Creek Village[H]		X		Free		11a-5p	YR	

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I. ATTRACTIONS

B. PUBLIC

LOCATION BY COUNTY AND SUB-COUNTY AREAS

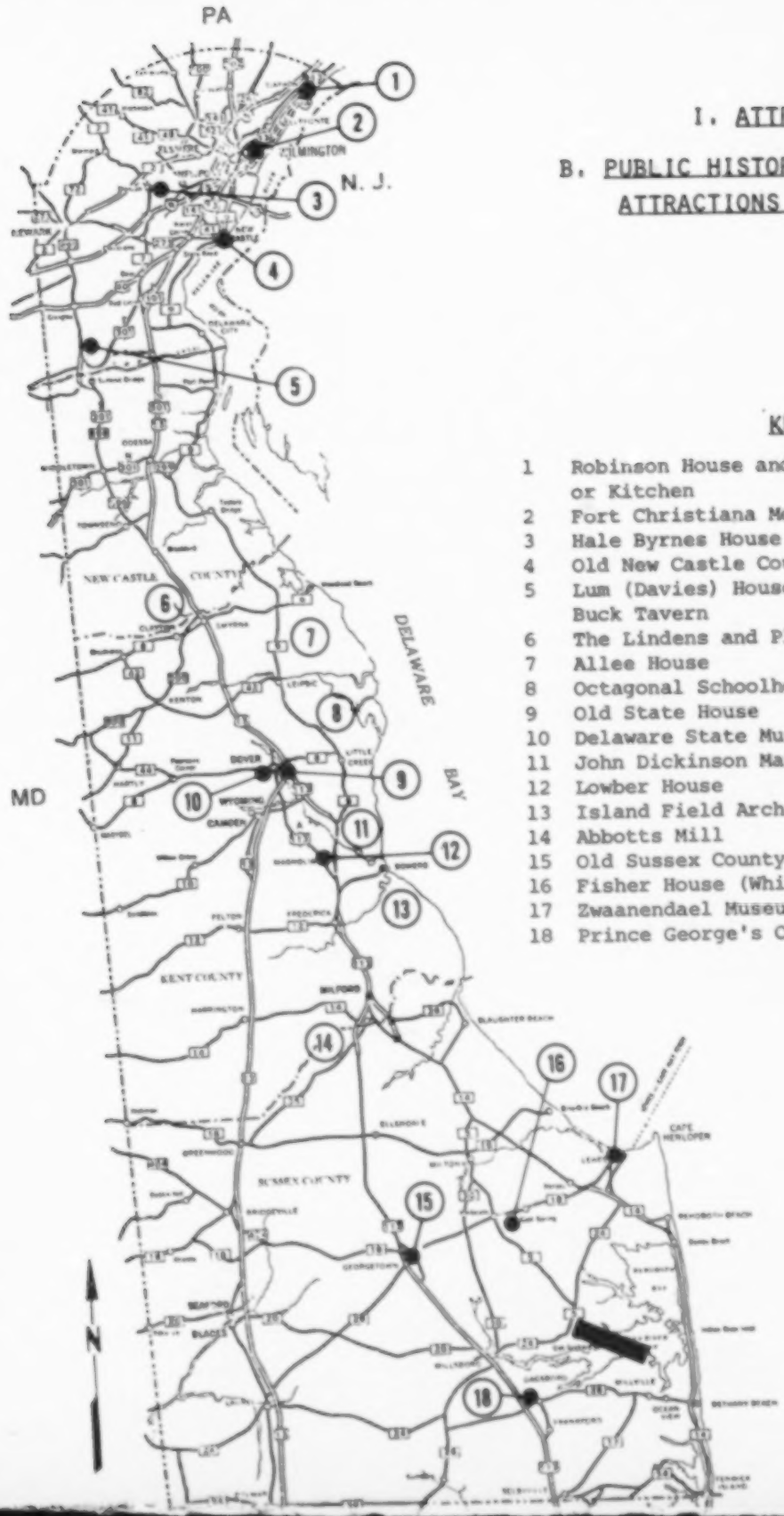
FACILITY	RATING AAA	RATING MOBIL	RATING GO/ DON'T GO	USER FEE (1 ADULT)	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	ANNUAL ATTENDANCE
SUSSEX COUNTY								
Dagsboro								
Prince George's Chapel[H]			**	Free	S, Su	10a-4:30p, 1:30-4:30p	YR	562
Georgetown								
Old Sussex County Courthouse[H]								
Sussex County Courthouse				Free	M-F	8:30a-4:30p	YR	
Lewes								
Abbotts Mill[H]				Free	7	All Day (Drive By)	YR	
Cape Henlopen Nature Center				State Park AC	7	7a-8:30p	YR	
Cape May-Lewes Ferry				AC	7	Schedule by Season	YR	
Zwaanendael Museum[H]	X	X	***	Free	T-S, Su	10a-4:30p, 1:30-4:30p	YR	18,688
Rehoboth Beach								
Boardwalk[1]				Free	7	All Day (Grounds)	YR	
Convention Hall				Contact City Mgr	Appt Only		YR	

KEY

1 - Shops along the Boardwalk generally are open May - September
H - Listed in National Register of Historic Places, either individually or as part of an historic district
TA - Tickets Available
AC - Admission Charge

I. ATTRACTIONS

B. PUBLIC HISTORIC AND CULTURAL ATTRACTIONS IN DELAWARE



KEY

1 Robinson House and "Swedish Block House" or Kitchen
2 Fort Christiana Monument
3 Hale Byrnes House
4 Old New Castle Courthouse
5 Lum (Davies) House and Sign of the Buck Tavern
6 The Lindens and Plank House
7 Allee House
8 Octagonal Schoolhouse
9 Old State House
10 Delaware State Museum
11 John Dickinson Mansion
12 Lowber House
13 Island Field Archeological Site
14 Abbotts Mill
15 Old Sussex County Court House
16 Fisher House (White Meadow Mansion)
17 Zwaanendael Museum
18 Prince George's Chapel

I. ATTRACTIONS

LOCATION: Wilmington

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
The DuPont Company 10th & Market Sts Wilmington 19898 (302) 774-1000	Basic research facilities are the largest in the free world. Facilities in Delaware include an experimental station and research centers for manmade and textile fibers.	School Groups Trade Groups	By Appointment Reserv Required	Small groups(10) No children No photographs No food/beverages
General Motors-Assembly Plant Boxwood & Dodson Sts Wilmington 19899 (302) 998-8831 Contact: Education and Training Office	Automotive assembly plant. This is the only Chevette plant in the United States.	Regularly scheduled plant tour for the general public (groups and individuals)	Regular plant tours are conducted Mon-Fri, at 9AM and 1PM. Appointments for large groups must be made three months in advance.	Group limit: 30 Min Age: 10 yrs No photographs
ICI-Americas New Murphy Rd & Concord Pike Wilmington 19803 (302) 575-3000 Contact: Public Relations	Manufactures chemicals and pharmaceuticals	General Public (groups and individuals) Trade Groups	By Appointment Reserv Required	Small groups No photographs No food/beverages
News-Journal Company 831 Orange St, PO 111 Wilmington 19899 (302) 573-2007 Contact: Tours	Tour of full newspaper production and printing operation	Regularly scheduled plant tour for the General Public (groups and individuals) Trade groups welcome but the	Regular plant tours are conducted Mon-Fri, at 11AM and 1PM (press time). Reserv Required	Min Age: 4th grade The News-Journal requests advance notice if members of the group want to take photographs or have

I. ATTRACTIONS

LOCATION: Wilmington C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
News-Journal Company (cont'd)		tour is designed for the General Public.		special needs so the Tour Office will have personnel and clearances ready.
Port of Wilmington Foot of Christiana Ave Wilmington 19801 (302) 571-4600 Contact: Port Office	City-operated port facility that handles fruit importation and large quantities of car imports and exports.	General Public (groups and individuals) Trade Groups	By Appointment Tours may be scheduled Mon-Fri, 8AM-12N and 1-4PM. Tours last 1½ hours. Reserv Required	None

I. ATTRACTIONS

LOCATION: New Castle County

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
Air Pal Corporation c/o Dayett Mills Rtes 72 & 4 Newark 19711 (302) 731-1500	Franchising headquarters for a unique hovercraft pallet cargo hauling device	General Public (groups)	By Appointment during the warm months of the year. Reserv Required	Min Age: 6 yrs No food/beverages
Air Products & Chemicals Rte 9 Delaware City 19706 (302) 328-1558 Contact: Plant Manager	Manufactures liquid oxygen and nitrogen by a process of extracting the elements from the atmosphere	General Public (groups and individuals) Trade Groups	By Appointment Reserv Required	No photographs No smoking No food/beverages
Dayett Mills Rtes 72 &4 Newark 19711 (302) 731-1500	Produces flour from grain using water turbine power	General Public (groups)	By Appointment during the warm months of the year. Reserv Required	Min Age: 6 yrs No food/beverages
Getty Refining & Marketing Rte 9 Delaware City 19706 (302) 834-6314	Refinery for crude oil with sulphur content	General Public (groups)	By Appointment Reserv Required	None
Motor Wheel Corporation 1901 Ogletown Rd Newark 19711 (302) 453-7500 Contact: Personnel Manager	Manufactures automotive wheels -- unique process	General Public (groups) on a limited basis	By Appointment Reserv Required	No children No photographs Group limit: 20

LOCATION: New Castle County

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
Photo Color, Inc. 2401 Ogletown Rd Newark 19711 (302) 737-1265	Manufactures lithographic negatives, plates and separations	Trade Tours (small groups and individuals	By Appointment Reserv Required	Small groups No food/beverages
Stuart Pharmaceuticals Div ICI-Americas 587 Old Baltimore Pike Newark 19711 (302) 575-8902 Contact: Public Relations	Manufactures chemicals and pharmaceuticals	General Public (groups and individuals) Trade (groups and individuals)	By Appointment Reserv Required	No food/beverages No photographs Small groups
Summit Aviation, Inc. Rte 896 Middletown 19709 (302) 834-5400 Contact: Flight School	General airport tour	General Public (groups)	Tours available on walk-in basis but Flight School recommends calling ahead for an appointment to ensure that guide will be present.	None
University of Delaware Institute of Energy Conversion, Solar One Newark 19711 (302) 995-7155	Developers of Solar One, the experimental home that is heated, cooled and powered by solar energy panels. The Institute is the nation's leading solar energy developer.	General Public (groups and individuals) Trade (groups and individuals)	Tours are offered Wed (7-9PM) and Sat (10AM-12N). Reserv Optional. Tours may be scheduled for other times by appointment.	None

I. ATTRACTIONS

LOCATION: Kent County

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
Delaware State News Webbs Ln & New Burton Rd Dover 19901 (302) 674-3600 Contact: Tours	Tour of full newspaper production and printing operation	General Public (groups) School Groups	By Appointment Reserv Required	Min Age:Junior High No food/beverages School Groups limited to English and Journalism Classes.

I. ATTRACTIONS

LOCATION: Sussex County

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
Barcroft Company Henlopen Drive Lewes 19958 (302) 645-6261	Manufactures antiacid product through extraction of salts from sea water	School Groups	By Appointment Reserv Required	No food/beverages Visitors must wear safety glasses and hats during tour.
Draper-King Cole Chestnut St Milton 19968 (302) 684-8555 Contact: Personnel Office	Manufactures canned vegatable products	General Public (groups)	By Appointment Reserv Required Tours may be scheduled Mon-Fri during work hours.	Group limit: 30 No photographs
NCR Corporation Mitchell Rd Millsboro 19966 (302) 934-8111 Contact: Personnel Office	Manufactures electronic business machines	General Public (groups)	By Appointment Reserv Required Tours may be scheduled Mon-Fri during work hours.	No children No photographs Restricted areas
Perdue Farms Georgetown 19947 (302) 856-6315	Produces and processes broiler and roaster chickens	General Public (groups and individuals) Trade Groups	By Appointment Reserv Required	No food/beverages No photographs Visitors must wear protective clothing for sanitation purposes.

Delaware State Travel Service

I. ATTRACTIONS

LOCATION: Sussex County

C. DELAWARE TECHNICAL PLANT TOURS

COMPANY	PRODUCT	KINDS OF TOURS	SCHEDULE	RESTRICTIONS
University of Delaware College of Marine Studies Mariculture Laboratory Lewes 19958 (302) 645-4213 Contact: Scheduling Secretary	Developers of an experimental contained environment for raising oysters and other shellfish	Small Trade Groups and Individual Researchers ONLY	By Appointment Reserv Required Tours may be scheduled Mon-Fri, 9AM-4PM	No pets Group limit: 10

I. ATTRACTIONS

D. NATIONAL REGISTER OF HISTORIC PLACES

NEW CASTLE COUNTY

Brandywine Village Historic District*
Buena Vista*
Corbit-Sharp House*
Jacob Dingee House
Obadiah Dingee House
Eleutherian Mills*
Zachariah Ferris House
Fort Christina*
Old Swedes Church*
Mendenhall House
New Castle Historic District*
Starr House
Winterthur*
Thomas Robinson House*
Odessa Historic District*
Breck's Mill*
Upper Louviers
Center Meeting and Schoolhouse
Fort Delaware*
Rotherdam Mill House
Walker's Mill
Lower Louviers
Rockland
Red Mill Farm (England House)
Old First Presbyterian Church*
Brandywine Manufacturers Sunday School
Hale-Byrnes House*
Appoquinimink Friends Meeting House*
Lombardy Hall
Middletown Academy
Masonic Hall and Grand Theater: The Grand Opera House*
Arden
Old Union Methodist Church
Old Drawyers Presbyterian Church*
Welsh Tract Church*
The Hermitage
Old St. Ann's Church*
Ashland Bridge
Clearfield Farm
Hockessin Friends Meeting House
Huguenot House
Hart House
White Clay Creek Presbyterian Church
Augustine Beach Hotel
Shallcross (Sereck) House
Cochran Grange
Hedgelawn
Lesley-Tavers Mansion
The Glebe House
Mill Creek Friends Meeting House
Cooch's Bridge Historic District*
Wooddale Bridge
Coffee Run Mission Site
Red Clay Creek Presbyterian Church
McCoy House
Naudain (Arnold S.) House
Greenlawn
Sutton House
McLane (Louis) House
Old New Castle Courthouse*
Saint James Church
New Castle and Frenchtown Railroad Right-of-Way*
Fisher (Andrew) House
Lum's Mill House*
Minquadale Home for Aged Men (Tobdell Estate)
Old College Historic District*
Williams House, Woodlawn
Greenbank Historic Area
Noxontown
Darley House
Strand Millas and Rock Spring
Old Brick Store
Woodstock
Dilworth House
Continental Army Encampment Site
Duncan Beard Site
Mermaid Tavern
La Grange
Stonum
Laurel, by Frank Lloyd Wright
Christiana Historic District
Old Town Hall, Wilmington*
Jacob Broom House (Hagley)
Eastern Lock of the Chesapeake and Delaware Canal

* Indicates site is in Section I.A. of the Resource Inventory
Source: Delaware Department of State, Division of Historical and Cultural Affairs

I. ATTRACTIONS

D. NATIONAL REGISTER OF HISTORIC SITES

NEW CASTLE COUNTY (CONT'D)

Liston House
Old Customs House
The Academy of Newark
Delaware Avenue Historic District
Rockwood*
Crooked Billett (Brindley Farm)
Old Asbury Methodist Church
Friends Meetinghouse Wilmington*
St. Joseph on the Brandywine
Wilmington AMTRAK Station*
St. Mary's R.C. Church (Church of St. Mary of the Immaculate)
Brandywine Park Conception
Swanwyck
Hell Island Site
Eastburn-Jeanes Lime Kilns
Amstel House*
Clyde Farm Site
Aiken's Tavern Historic District
St. Joseph's Church
The Maples
Howard Pyle Studios
Rumsey Farm
Philip Reading Tannery
Joseph Dean & Son Woolen Mill
Public School #29 (Lamborn Library)
Garrett Snuff Mill
Montchanin Historic District
Augustine Paper Mill
The Beaver Valley Rock Shelter Site
Rockford Park
Middletown Historic District
Wilmington and Western Railroad (Designation Pending)*

KENT COUNTY

Allee House*
Aspendale
John Dickinson Mansion*
Octagonal Schoolhouse*
Old State House*
Loockerman Hall
Parson Thorne Mansion*
Belmont Hall
Island Field Site*
Duck Creek Village*
Delaware State Museum*
Matthew Lowber House*
Barratts Chapel*
Bradford House (Bradford-Loockerman)
Christ Church, Dover*
Woodburn (The Governor's House)*
Kingston-Upon-Hull (Town Point)
Bonwell House
Snowland
Cooper House, (Kenton)
Tharp House
Tyn Head Court
Manlove Hayes House (Greenwold)
Great Geneva
Camden Friends Meeting House
Bannister Hall, Baynard House
Sutton (Thomas) House
Ruth Mansion House
Wheel of Fortune
Ivy Dale Farm
Barratt Hall
Mordington
Lindale House
Eden Hill
Christ Church, Milford*
Jehu Reed House
Jones, Enoch House (Boxwood)
Old Stone Tavern
Scene of Cheyney Clow's Rebellion
Camden Historic District
Macomb Farm Thomas Irons House
Brecknock
Somerville
John Bullen House
Boundary Lines
Mount Moriah Old School Baptist Church (Cow Marsh)
Vogl House

* Indicates site is in Section I.A. of the Resource Inventory
Source: Delaware Department of State, Division of Historical and Cultural Affairs

I. ATTRACTIONS

D. NATIONAL REGISTER OF HISTORIC PLACES

KENT COUNTY (CONT'D)

Dover Green Historic District*
Carey Farm Site
Frederica Historic District
J.H. Wilkerson & Son Brickworks
Bank House
Golden Mine
Dill Farm Site

SUSSEX COUNTY

Joshua Fisher House (White Meadow Farm)
Thomas Maull House
Old Sussex County Court House*
St. George's Chapel*
Old Christ Church, Broad Creek*
Fisher's Paradise
Abbott's Mill*
DeVries Palisade
Carey's Camp Meeting Ground
Draper-Adkins House
Sussex County Courthouse and the Circle
Governor Ponder House
Pagan Creek Dike
Hazzard House*
Highball Signal
Cannon's (Woodland) Ferry*
The First Broiler House
Sundler House
Bethel Historic District
Maston House
Colonel David Hall House
Spring Banke
Blackwater Presbyterian Church
Indian River Life Saving Service Station
Delaware Breakwater and Harbor of Refuge
Colman House
William Russell House
Lewes Histroic District*
Lewes Presbyterian Church
The Warrington Site
Deep Creek Furnace Industrial Complex
St. Luke's Protestant Episcopal Church
Wm. H. Ross Mansion
Peter Marsh House (Homestead)
Pine Grove Furnace Site
Melson House
Wilgus Site
Maull House Amendment*
Burton Hardware Store
Trinity Methodist Episcopal Church
Lawrence
Chipman's Mill
Hearn & Rawlins Mill (Cannon & Ross Mill; Hearn Mill)
Seaford Station
The Townsend Site
Thompson's Loss and Gain Site
Warren's Mill
Fenwick Lighthouse (Designation Pending)*

* Indicates site is in Section I.A. of the Resource Inventory
Source: Delaware Department of State, Division of Historical and Cultural Affairs

II. EVENTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

EVENT	CONTACT	TELEPHONE	DATE
New Castle County			
Newark			
Delaware Scottish Games	Delaware Scottish Games Assn.	731-5101	1st Sat in June
Newark Antique Show	St. Thomas Episcopal Church	268-4644	September
Newark Symphony Orchestra Concerts	Newark Symphony Orchestra	731-2223	Year round
New Castle			
A Day in Old New Castle	Immanual Episcopal Church On the Green	328-3279	3rd Sat in May
Art-on-the-Green	New Castle Hundred Lions Club	575-3632	September
Band Concerts	New Castle Parks & Recreation Dept.	571-7700	June-August
New Castle Antiques Show	New Castle Presbyterian Church	328-3279	1st Wknd in Oct
Odessa			
Art Show	St. Paul's United Methodist Church	378-2420	May
Christmas in Odessa (Odessa Day)	Old St. Paul's Church	378-2420	1st Sun in Dec
Wilmington and Brandywine Hundred Area			
Ardentown			
Annual Ardentown Antique Show	YWCA of Ardentown	475-8424	Nov-Dec
Brandywine			
Battle of the Brandywine			September
Brandywine Raceway Harness Racing	Brandywine Raceway Assn.	478-1220	Mid-May - Mid-Sept

LOCATION BY COUNTY AND SUB-COUNTY AREAS

EVENT	CONTACT	TELEPHONE	DATE
Stanton			
Delaware Park Thoroughbred Racing	Delaware Park Racetrack	994-2521	July-September
Wilmington			
Annual Fishing Derby		654-4446	April
Annual Green Bazaar	Greek Orthodox Church		Spring
Brandywine Arts Festival, Josephine Gardens	Wilmington Dept. of Parks & Recreation	656-8364	2nd Wknd in Sept
Christmas at Hagley	Hagley Museum	658-2401	December
Christmas Shop, Hotel du Pont	Hotel du Pont	656-8121	
Cityside Tour	Cityside	658-8462	October
Clothesline Art Fair	Wilmington Flower Market, Inc.		1st Tues-Thurs in May
Concerts in the Park	New Castle County Dept. of Parks & Recreation	571-7700	June through August
Delaware Antiques Show	Wilmington Medical Center	428-1212	Early December
Gem and Mineral Show	Delaware Mineralogical Society, Inc.	475-1979	1st Wknd in April
Grand Opera House Concerts	Grand Opera House	652-5571	Year-round
International Photography Exhibition	Delaware Camera Club	652-5653	Late February
Italian Festival	St. Anthony's Church	652-2352	June
Maritime Days	Port Maritime Society/Cityside	658-8462	September
Old Willingtown Days	Historical Society of Delaware	655-7161	October
Shakespearian Play Festival	Arden Players Guild, Open Air Theatre		June
Wilmington Flower Market	Wilmington Flower Market, Inc.		2nd Weekend in May
Wilmington Garden Day	Immanuel Church	658-7326	1st Saturday in May
Winterthur			
Winterthur Gardens Special Seasonal Tours	Winterthur	656-8591	Seasonal

II. EVENTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

EVENT	CONTACT	TELEPHONE	DATE
Kent County			
Bowers Beach			
Blessing of the Boats-May Day, Celebration and Flea Market	Bowers Beach Maritime Museum	335-3462	May
Dover			
Cultural Appreciation Day	HAZ Corporation		Late Summer, Fall
Delaware Day Celebration	Div. of Historical and Cultural Affairs	678-5314	December 7
Dover Air Force Base, Public Appreciation Day	Dover Air Force Base	678-7011	Late Summer, Fall
Dover Downs Atlantic Coast "300" NASCAR	Dover Downs International Speedway	674-4600	July
Dover Downs Harness Racing	Dover Downs International Speedway	674-4600	November-March
Mason-Dixon "500" NASCAR	Dover Downs International Speedway	674-4600	May
Old Dover Days	Friends of Old Dover	678-2040	1st Weekend in May
State House Symposium	Division of Historical and Cultural Affairs	678-5314	Spring
Harrington			
Delaware State Fair	Delaware State Fair, Inc.	398-3269	Late July
First State Gold Cup Motorcycle Races	Delaware State Fair, Inc.	398-3269	July
Harness Racing, Harrington Raceway	Harrington Raceway	398-8134	March 27 - May 5

LOCATION BY COUNTY AND SUB-COUNTY AREAS

EVENT	CONTACT	TELEPHONE	DATE
Kent County (continued)			
Milford			
Canoe Races	Milford Chamber of Commerce	422-3301	September
Christmas Antique and Craft Market	" " "	"	November
Harvest Festival	" " "	"	October
Hospital Fair	Milford Hospital Auxiliary	422-3311	May
Parson Thorne Day	Milford Chamber of Commerce	422-3301	July
Spring Jubilee	" " "	"	May
World Champion Weakfish Tournament	" " "	"	May

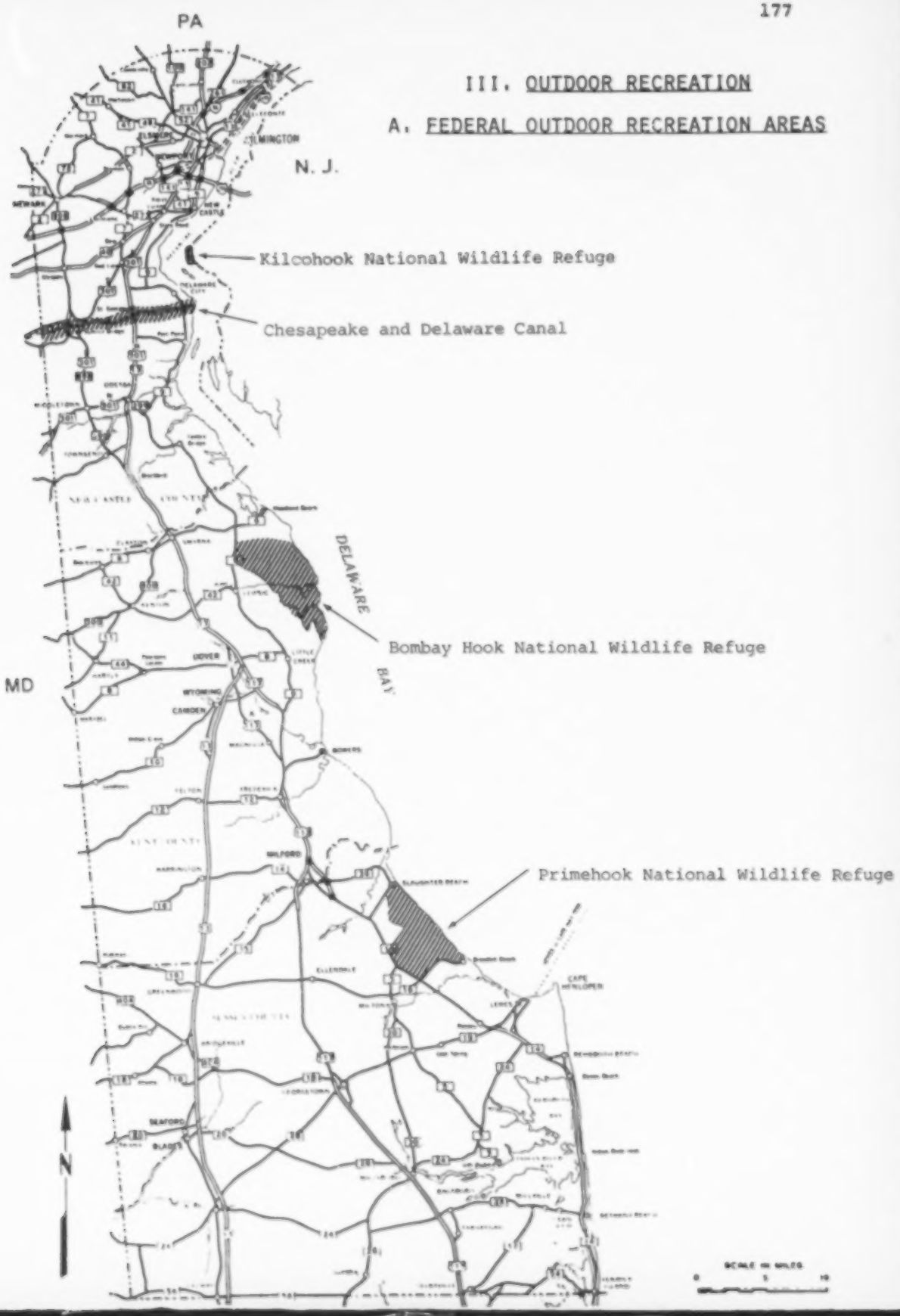
II. EVENTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

EVENT	CONTACT	TELEPHONE	DATE
Sussex County			
Lewes			
Antique Fair & Flea Market	Lewes Historical Society	645-9673	July
Cape Henlopen Craft Fair & Folk Life Festival		645-8988	
Christmas House Tour	Lewes Historical Society	856-7041	1st Sat in December
Kite Festival, Cape Henlopen State Pk.	Lewes Chamber of Commerce	645-8073	Good Friday
Seashore Marathon	" " "	"	October
Rehoboth Beach			
Annual Flea Market	Rehoboth Art League	227-8408	June 25
Canoe Race	Coastal Chamber of Commerce		Su of Wknd before Mem. Day
Cottage Tour of Art	Rehoboth Art League	227-8408	Mid June
Band Concerts	City of Rehoboth	227-6181	Summer
Easter Sunrise Service	Rehoboth Chamber of Commerce	227-2233	Easter
Easter Promenade	" " "	"	Easter
Life Guard Olympics	" " " and Rehoboth Life Guards	"	Mid August
Miss Delaware Scholarship Pageant	Miss Delaware Pageant, Inc.		
Sand Castle Building	The Whale Newspaper	645-2065	Summer
Sidewalk Sale	Rehoboth Chamber of Commerce	227-2233	Early September

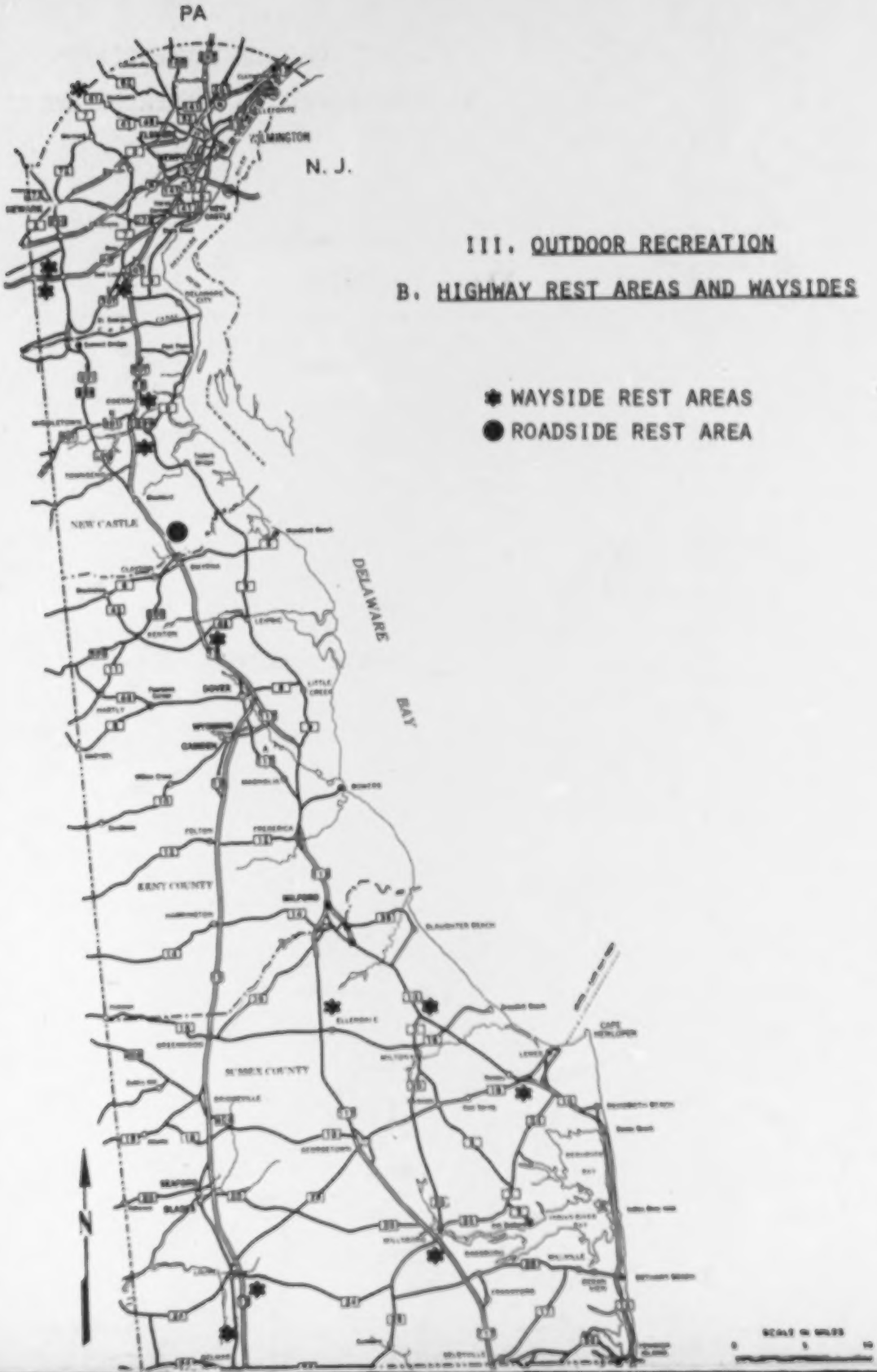
III. OUTDOOR RECREATION

A. FEDERAL OUTDOOR RECREATION AREAS



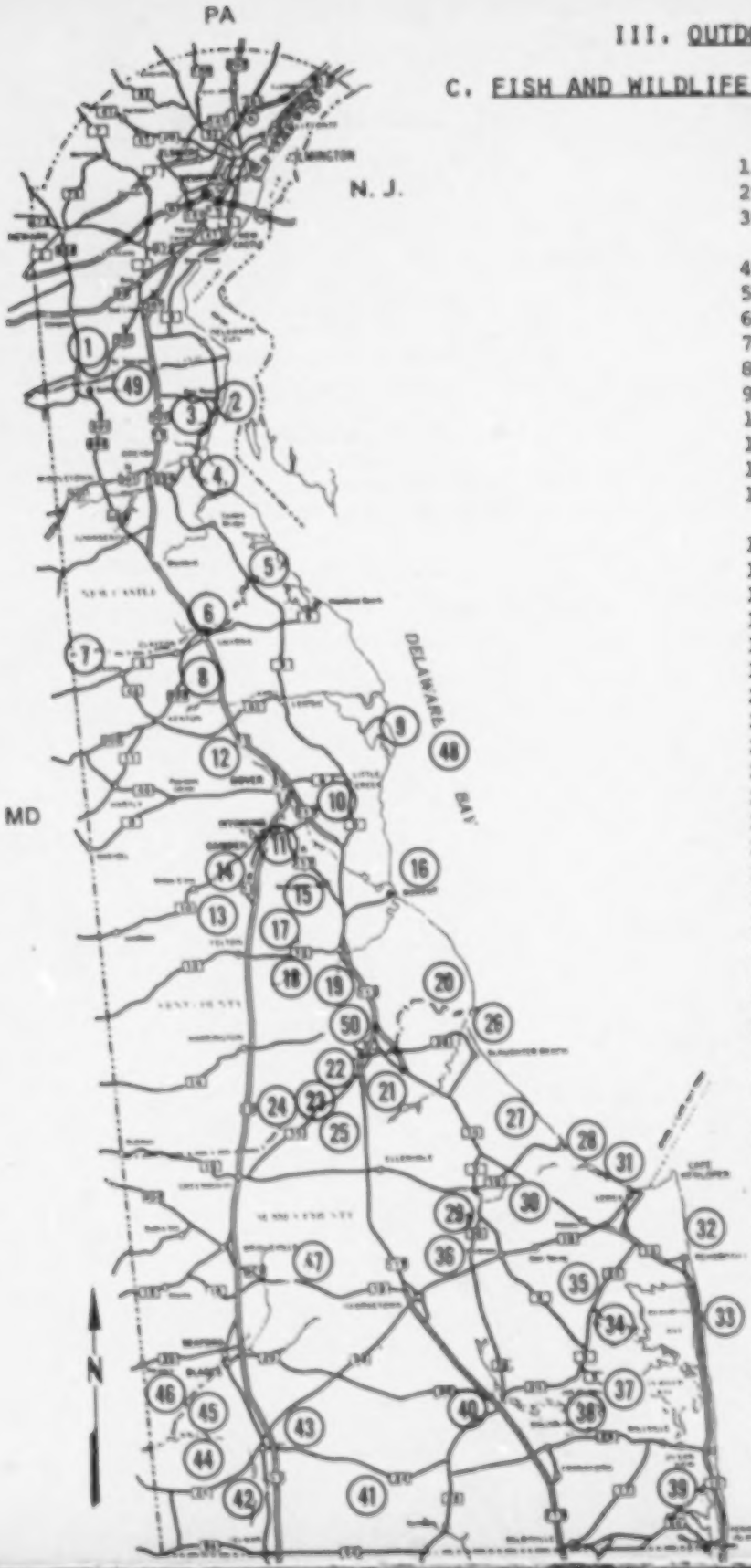
III. OUTDOOR RECREATION

B. HIGHWAY REST AREAS AND WAYSIDES



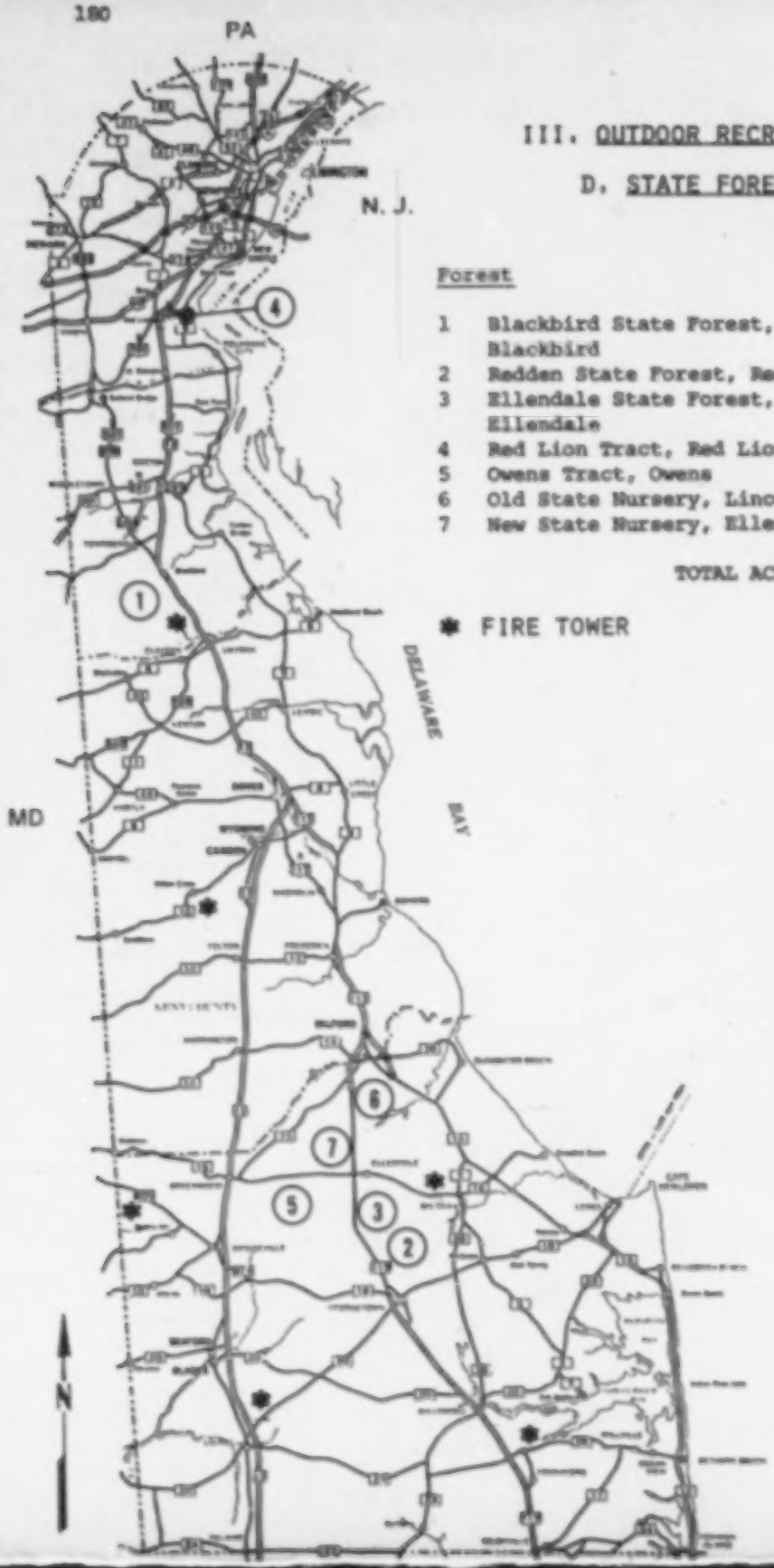
III. OUTDOOR RECREATION

C. FISH AND WILDLIFE OUTDOOR RECREATION AREAS



KEY

1 Lums Pond
2 Reedy Island
3 Augustine Beach Wildlife Area
4 Appoquinimink Wildlife Area
5 Woodland Beach Wildlife Area
6 Duck Creek
7 Blackiston Wildlife Area
8 Garrisons Lake
9 Little Creek Wildlife Area
10 SPCA Dog Shelter
11 Moore's Lake
12 Fox Hall
13 Norman G. Wilder Wildlife Area
14 Derby Pond
15 McGinnis Pond
16 Bowers Beach Access Area
17 Andrews Lake
18 Coursey Pond
19 McCauley Pond
20 Milford Neck Wildlife Area
21 Silver Lake
22 Haven Lake
23 Griffiths Pond
24 Blairs Pond
25 Abbotts Pond
26 Cedar Creek Access Area
27 Fowler Beach Access Area
28 Primehook Wildlife Area
29 Milton Access Area
30 Waples Pond
31 Lewes Access Area
32 Gordon Pond Wildlife Area
33 Rehoboth Bay Recreation Area
34 Rehoboth Bay Access Area
35 Rabbits Ferry
36 Gravel Hill
37 Rosedale Beach Access Area
38 Pepper Creek Access Area
39 Assawoman Wildlife Area
40 Ingrams Pond
41 Raccoon Pond
42 Horsey Pond
43 Records Pond
44 Portsville Pond
45 Nanticoke Wildlife Area
46 Craigs Pond
47 Tussock Pond (Collins)
48 Port Mahon Access Area
49 Canal Wildlife Area
50 Tub Mill Pond



III. OUTDOOR RECREATION

D. STATE FORESTS

	Forest	Acreage
1	Blackbird State Forest, Blackbird	1,795
2	Redden State Forest, Redden	3,215
3	Ellendale State Forest, Ellendale	1,139
4	Red Lion Tract, Red Lion	5
5	Owens Tract, Owens	170
6	Old State Nursery, Lincoln	3
7	New State Nursery, Ellendale	58
	TOTAL ACREAGE:	6,385

✱ FIRE TOWER

III. OUTDOOR RECREATION

E. STATE PARKS

KEY

State Park		Acreage
1	Brandywine Creek	433
2	Walter S. Carpenter Jr.	436
3	Fort Delaware	161
4	Lums Pond	1,325
5	Killens Pond	551
6	Holts Landing	33
7	Cape Henlopen	2,760
8	Delaware State Seashore	1,999
9	Trap Pond	965
10	Bellevue	273
	TOTAL ACREAGE:	8,936

Source: 1978 Delaware SCORP

III. OUTDOOR RECREATION

F. PUBLIC AND PRIVATE RESOURCE FACILITIES

Table 6a

PHYSICAL RESOURCES / PLANNING REGIONS		PARKS & PRESERVES		HISTORIC & CULTURAL		PICNIC	WATER BASED										
		TOTAL ACRES	TOTAL LIN. MILES	NO. SITES	NO. SITES WITH FESTIVE AND ARTISTIC EVENTS	NO. PICNIC TABLES	NO. FISHING & BOATING ACRES - FRESHWATER PONDS AND STREAMS	NO. FISHING & BOATING ACRES INLAND BAYS-TIDAL RIVERS	NO. FISHING & BOATING ACRES DEL. BAY & DE. RIV.	NO. BOAT RAMPS	LIN. FT. SHORELINE FRESH WATER FISHING	LIN. FT. SHORELINE SALT WATER FISHING	NO. LIN. FEET FISHING PIERS	NO. OF BOAT SLIPS	LIN. FT. SWIMMING SHORELINE-BAYS & PONDS	LIN. FT. SWIMMING SHORELINE-OCEAN	SWIMMING POOLS	TOTAL SQ. FT. SWIMMING POOLS
TOTALS	WILMINGTON	3,386.3	-	3	-	27	-	-	-	2	-	-	-		-	-	15	94,650
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	29,839.2	6.75	11	1	1,131	268.5	-	1,510	7	7,100	3,000	1,170	102	650	-	27	174,313
	KENT COUNTY	35,553.6	1.75	13	1	675	414	1,170	13	26	13,250	20,900	825	161	21,500	-	5	16,300
	SUSSEX COUNTY	26,727.6	24.41	16	2	3,390	760	69.69	15	58	27,508	104,620	1,620	2,295	30,970	37,230	14	32,945
	STATEWIDE	95,506.7	32.91	43	4	5,023	1,465.5	1,239.69	1,538	93	47,858	128,520	3,615	2,558	53,120	37,230	61	313,308
PUBLIC	WILMINGTON	379.3	-	1	-	-	-	-	-	-	-	-	-	-	-	-	11	78,094
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	28,332.2	6.75	8	1	791	221	-	1,510	5	7,100	3,000	1,170		550	-	21	153,863
	KENT COUNTY	31,877.2	1.75	10	1	221	362	1,170	13	19	11,050	900	825	18	1,350	-	-	-
	SUSSEX COUNTY	24,873.3	24.41	10	2	606	653	69.69	15	27	27,508	90,970	1,620	188	27,170	29,780	2	4,250
	STATEWIDE	85,462.0	32.91	29	4	1,618	1,236	1,239.69	1,538	51	45,658	94,870	3,615	206	29,070	29,780	34	236,167
PRIVATE	WILMINGTON	3,007	-	2	-	27	-	-	-	2	-		-		-		4	16,556
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	1,507	-	3	-	340	47.5	-	-	2	-	-	-	102	100	-	6	20,450
	KENT COUNTY	3,676.4	-	3	-	254	52	-	-	7	2,200	20,000	-	143	20,150	-	5	16,160
	SUSSEX COUNTY	1,854.3	-	6	-	2,784	130	-	-	31	-	13,650	-	2,107	3,800	7,450	12	28,665
	STATEWIDE	10,044.7	-	14	-	3,405	229.5	-	-	42	2,200	33,650	-	2,352	24,050	7,450	27	82,075

Table 6a

PHYSICAL RESOURCES / PLANNING REGIONS		LINEAR SYSTEMS					GROUNDS AND COURTS							HUNTING/ GUNNING AREAS	CAMPS		ICE AND SNOW BASED	
		NO. MILES BIKE TRAILS/WAYS	NO. MILES HIKING TRAILS	NO. MILES NATURE TRAILS	NO. MILES SCENIC AUTO ROUTES	NO. MILES HORSE-BACK TRAILS	NO. ACRES OF EQUIPPED PLAY-GROUNDS	NO. BASEBALL/ SOFTBALL FIELDS	NO. BASKETBALL/ VOLLEYBALL COURTS	NO. TENNIS COURTS	NO. 18 HOLE GOLF COURSES	NO. 9 HOLE GOLF COURSES	NO. FOOTBALL/ SOCCER FIELDS	NO. HUNTING AND GUNNING ACRES	NO. DEVELOPED CAMPSITES	NO. ACRES OF UN-DEVELOPED CAMPSITE	SQ. FT. ICE SKATING RINKS	NO. ACRES SLEDDING TOBOGANING
TOTALS	WILMINGTON	-	-	-	-	-	22.75	32	55	61	11	1	6	-	-	-	-	-
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	19.8	46.5	57.42	22.55	49.5	141.9	235	210	216	6	2	101	13,287	207	43	25,000	-
	KENT COUNTY	2.3	2.5	9.5	32.34	13	77.92	87	43.5	61	2	1	27	21,071	222	30	-	-
	SUSSEX COUNTY	11	16	7.5	7.5	13.5	21.95	60	46	63	3	2	31	8,426	3,913	34	-	-
	STATEWIDE	33.1	65	74.42	62.39	76	264.52	415	354.5	401	22	5	165	42,784	4,342	107	25,000	-
PUBLIC	WILMINGTON	-	-	-	-	-	22.75	33	55	17	-	-	6	-	-	-	-	-
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	19.8	43.5	55.92	22.55	43.5	138.9	224	207	205	2	1	89	13,287	57	35	5,000	-
	KENT COUNTY	-	2.5	3.5	32.34	-	70.37	70	35.5	42	-	-	26	18,944	-	30	-	-
	SUSSEX COUNTY	8	14	7.5	7.5	13.5	18.45	60	44	44	-	-	31	8,426	802	34	-	-
	STATEWIDE	27.8	60	66.92	62.39	57	250.47	387	341.5	308	2	1	152	40,657	859	99	5,000	-
PRIVATE	WILMINGTON	-	-	-	-	-	-	-	-	44	11	1	-	-	-	-	-	-
	NEW CASTLE COUNTY OUTSIDE WILMINGTON	-	3	1.5	-	6	3	11	3	11	4	1	12	-	150	8	20,000	-
	KENT COUNTY	2.3	-	6	-	13	7.55	17	8	19	2	1	1	2,127	222	-	-	-
	SUSSEX COUNTY	3	2	-	-	-	3.5	-	2	19	3	2	-	-	3,111	-	-	-
	STATEWIDE	5.3	5	7.5	-	19	14.05	28	13	93	20	5	13	2,127	3,483	8	20,000	-

Source: 1979 Delaware SCORP

III. OUTDOOR RECREATION

F. PUBLIC AND PRIVATE RESOURCE FACILITIES

Table 6b

PHYSICAL RESOURCES / COMMUNITY TYPES		PARKS AND PRESERVES		HISTORIC & CULTURAL		PICNIC	WATER BASED										
		TOTAL ACRES	TOTAL LIN. MILES	NO. SITES	NO. SITES WITH FESTIVE & ARTISTIC EVENTS	NO. PICNIC TABLES	NO. FISHING & BOATING ACRES - FRESHWATER PONDS AND STREAMS	NO. FISHING & BOATING ACRES INLAND BAYS - TIDAL RIVERS	NO. FISHING & BOATING ACRES DEL. BAY & DEL. RIV.	NO. BOAT RAMPS	LIN. FT. SHORELINE FRESH WATER FISHING	LIN. FT. SHORELINE SALT WATER FISHING	NO. LIN. FEET FISHING PIERS	NO. OF BOAT SLIPS	LIN. FT. SWIMMING SHORELINE BAYS & PONDS	LIN. FT. SWIMMING SHORELINE-OCEAN	SWIMMING POOLS	TOTAL SQ. FT. SWIMMING POOLS
TOTALS	URBAN METRO	31,738.6	6.75	11	1	1,150	266.5	-	1,510	9	7,100	3,000	1,170	102	550	-	42	268,967
	URBAN NON METRO	2,593.4	1.5	7	3	413	376.8	-	-	14	15,698	7,920	-		8,570	-	9	24,100
	RURAL NON METRO	61,174.7	24.66	25	-	3,460	822.2	1,239.69	28	70	25,060	117,600	2,445	2,456	44,000	37,230	9	25,115
	STATEWIDE	95,506.7	32.91	43	4	5,023	465.5	1,239.69	1,538	93	47,858	128,520	3,615	2,558	53,120	37,230	61	318,242
PUBLIC	URBAN METRO	27,224.6	6.75	9	1	791	221	-	1,510	5	7,100	3,000	1,170		550	-	32	231,917
	URBAN NON METRO	1,677.4	1.5	3	3	137	309.8	-	-	9	15,698	7,920	-		8,470	-	-	-
	RURAL NON METRO	56,560	24.66	17	-	690	705.2	1,239.69	28	37	22,860	83,950	2,445	206	20,050	29,780	2	4,250
	STATEWIDE	85,462.0	32.91	29	4	1,618	1,236	1,239.69	1,538	51	45,658	94,870	3,615	206	29,070	29,780	34	236,167
PRIVATE	URBAN METRO	4,514	-	2		359	45.5	-	-	4	-	-	-		-	-	10	37,930
	URBAN NON METRO	916	-	4	-	276	67	-	-	5	-	-	-		100	-	9	24,100
	RURAL NON METRO	4,614.7	-	3		2,770	117	-	-	33	2,200	33,650	-	2,352	23,050	7,450	8	20,865
	STATEWIDE	10,044.7	-	14	-	3,405	229.5	-	-	42	2,200	33,650	-	2,352	24,050	7,450	27	82,075

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Table 6b

PHYSICAL RESOURCES / COMMUNITY TYPES		LINEAR SYSTEMS					GROUNDS AND COURTS							HUNTING/ GUNNING AREAS	CAMPS		ICE AND SNOW BASED	
		NO. MILES BIKE TRAILS/WAYS	NO. MILES HIKING TRAILS	NO. MILES NATURE TRAILS	NO. MILES SCENIC AUTO ROUTES	NO. MILES HORSEBACK TRAILS	NO. ACRES OF EQUIPPED PLAYGROUNDS	NO. BASEBALL/ SOFTBALL FIELDS	NO. BASKETBALL/ VOLLEYBALL COURTS	NO. TENNIS COURTS	NO. 18 HOLE GOLF COURSES	NO. 9 HOLE GOLF COURSES	NO. FOOTBALL/ SOCCER FIELDS	NO. HUNTING AND GUNNING ACRES	NO. DEVELOPED CAMPSITES	NO. ACRES OF UN-DEVELOPED CAMPSITES	SQ. FT. ICE SKATING RINKS	NO. ACRES SLEDDING TOBOGGANING
TOTALS	URBAN METRO	19.8	46.5	57.4	22.55	49.5	161.65	268	265	277	17	3	107	13,287	207	43	25,000	-
	URBAN NON METRO	-	-	1.	-	3	69.49	87	48.5	81	2	2	36	-	236	-	-	-
	RURAL NON METRO	13.3	18.5	16	39.84	23.5	30.38	60	41	43	3	1	22	29,497	3,899	64	-	-
	STATEWIDE	33.1	65.	74.42	62.39	76	264.52	415	354.5	401	22	6	165	42,784	4,342	107	25,000	-
PUBLIC	URBAN METRO	19.8	43.5	55.92	22.55	43.5	161.65	257	262	222	2	1	95	13,287	57	35	5,000	-
	URBAN NON METRO	-	-	-	-	-	67.99	84	46.5	56	-	-	35	-	24	-	-	-
	RURAL NON METRO	8	16.5	11	39.84	13.5	20.83	46	35	30	-	-	22	27,370	778	64	-	-
	STATEWIDE	27.8	60	66.92	62.39	57	250.47	387	341.5	308	2	1	152	40,657	859	99	5,000	-
PRIVATE	URBAN METRO	-	3	1.5	-	6	3	11	3	55	15	2	12	-	150	8	20,000	-
	URBAN NON METRO	-	-	1	-	3	1.5	3	4	25	2	2	1	-	212	-	-	-
	RURAL NON METRO	5.3	2	5	-	10	9.55	14	6	13	3	1	-	2,127	3,121	-	-	-
	STATEWIDE	5.3	5	7.5	-	19	14.05	28	13	93	20	5	13	2,127	3,483	8	20,000	-

Source: 1979 Delaware SCORP

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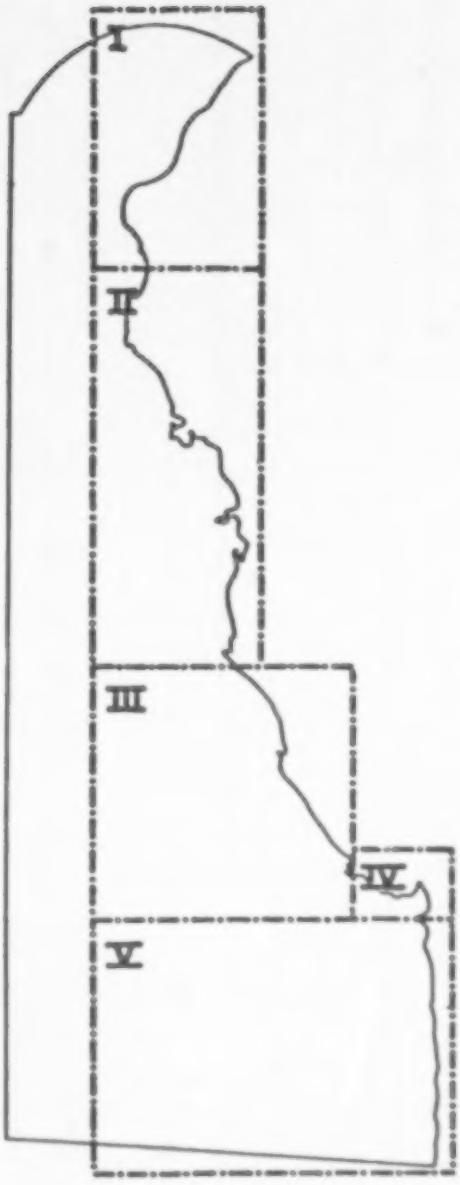
III. OUTDOOR RECREATION

G. MARINE RECREATION FACILITIES AND SERVICES



DELAWARE: SECTIONAL MAP

FACILITIES AND SERVICES

MAP SECTION NO.		No. Slips	Launching Ramp	Hours	Days Open	Year Round	Apr-Oct	Storage: Wet-Dry	Boatlift Capacity	Railway	Repairs, mechanical	Repairs, outdrive	Gasoline	Diesel	Boat, motor sales	Marine Supplies	Fresh water	Electricity	Telephone	Ice	Charter Boats	Head Boats
III	Adam's Wharf	50		6a-7p	7	•		WD					•	•		•	•		•	•	•	•
IV	Angler's Marina	32		6a-6p	7		•						•	•			•	•	•	•		
III	Bill-Lin-Sue Marina	150		5a-7p	7		•	D	25T							•	•	•	•	•	8	
III	Bowers Beach Public Launch		•																			
	Canal Boat Yard	17		6a-7p	7	•				•	•			•			•				3	
I	Delaware City Marina, Inc.	56	•	8a-4p	7	•		WD	25T		•	•	•	•		•	•	•	•			
I	Delaware City Public Launch		•																			
IV	Ellis Marine, Inc.			9a-6p	5½	•							•		•							
I	Fort Christiana Marina, Inc.	9	•	8a-5p	6½	•		WD	20T				•	•	•	•	•	•	•			
V	Henlopen Acres Yacht Club	50		7a-7p	7		•	WD		•	•		•				•	•	•			
V	Holt's Landing Public Launch		•																			
V	Indian River Boat Basin	180	•	6a-8p	7	•		WD			•	•	•	•		•	•	•	•	•	•	•
V	Indian River Oyster Basin	27	•	7a-7p	7		•	WD		•	•		•				○	•	•	•		
V	Kohler's Marine		•	6a-6p	7	•		D	2T		•	•	•		•	•	•	•	•			
IV	Lewes Harbour Marina	27		6a-7p	7		•										•	•	•	•	•	
IV	Town of Lewes Public Dock	1																				
IV	Lewes Public Launch		•																			
IV	Lewes Yacht Club, Inc.	50	•	6a-7p	7		•	D					•	•			•	•	•	•		
V	Love Creek Marina	75	•	6a-6p	7		•	WD					•	•		•		•	•	•		
V	Massey's Landing	80	3	6a-7p	7		•	WD			•					•	•	•	•	•		
III	Town of Milton	12	•	9a-3p	5	•																
V	Millsboro Public Launch		•																			
III	Mispillion Inlet Public Launch		•																			
V	Murray's Yacht Basin	138	2	8a-on	7	•		WD			•	•	•			•		•	•			
V	The Ocean View Boat Co.			8a-5p	7	•		D	2T		•	•	•		•	•						
V	Pete's Marina	25	•	6a-on	7		•	WD					•				•	•				
V	Pier Point Marina	175	•	8a-on	7	•		WD	3T		•	•	•		•	•	•	•				
IV	Pilot Town Yacht Basin	28		7a-6p	7		•	W										•				
II	Port Penn Public Launch		•																			
V	Rehoboth Bay Marina	250		8a-8p	7	•		WD	•		•	•	•		•	•	•	•	•			
V	Riverdale Public Launch		•																			
V	Shockley's Boatel	40	•	6a-9p	7		•	WD			•	•	•		•	•	•	•	•	•	•	
V	Shawn's Hideaway	60	•	7a-11p	7		•						•				•	•	•			
V	Short's Sales and Service	10	•	8a-10p	7	•			4T		•	•	•		•	•		•	•			
V	South Shore Marina	90	•	5a-6p	7	•		WD	25T		•		•	•		•	•	•	•	•	15	
III	Spirit Marine (2)	5		8a-8p	7	•		WD		•	•	•			•	•	•	•	•			
III	Steamboat Landing			7a-9p			•						•				•	•	•	•		
IV	Stokes Marine, Inc.	15		8a-7p	5					•	•						•	•	•			
III	Taylor Marine		•	8a-8p	7	•		D	2T		•	•			•	•						
V	Timmons Marina, Inc.	62	•	7a-5p	7	•		WD		2	•	•	•	•	•	•	•	•	•	•	•	
III	Webb's Marine	15		7a-8p	7	•		D			•	•			•	•	•		•			
II	Woodland Beach Public Launch		•																			
III	Mispillion Lighthouse Marina	25	•	5a-2a	7		•	W					•	•		•	•	•	•	•	•	•

Source: Delaware Sea Grant Marine Advisory Service

IV. SUPPORT FACILITIES

A. CAMPGROUNDS, PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME AND LOCATION OF FACILITY	APPROX. # OF TRAILER SITES	APPROX. # OF TENT SITES	ANNUAL OP. PERIOD	USER FEE	FACILITIES* UTILITIES	SNACK BAR	BOAT RAMP
New Castle County							
North Delaware A-OK Campground, Bear	200	200	YR	$6.00	E,S,D	X	X
Kent County							
Calloway's Hitching Rail Campground, Harrington	125	40	4/15-1/15	$5.00	E,D		X
Sussex County							
Delaware Shore Area							
Bay Shore Campsites, Ocean View	300	0	9/15-9/30	$6.00	E,S,D		X
Big Oaks Family Campgrounds, Lewes	125	70	5/1-9/30	$5.00	E,S,D	X	
Camp Arrowhead Church Camp, Millsboro	Cabins and prim. sites		YR[1]	Fee	E,S,D		
Holiday Trailer and Camping Park	15	0	4/1-10/15	Seasonal Fee	E,S,D,W		
Holly Lake Campsites, Millsboro	450	450	YR	$5.00	E,S,D	X	X

KEY

D - Dumping Station
E - Electricity
S - Sewer
W - Water

Note 1: Church Youth Camp and small groups in summer; small groups/meetings in heated cabins in winter
*For additional information see Delaware Campground Association brochure

IV. SUPPORT FACILITIES

A. CAMPGROUNDS, PRIVATE

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME AND LOCATION OF FACILITY	APPROX. # OF TRAILER SITES	APPROX. # OF TENT SITES	ANNUAL OP. PERIOD	USER FEE	FACILITIES*		
					UTILITIES	SNACK BAR	BOAT RAMP
Delaware Shore Area (continued)							
Homestead Campsites, Georgetown	44	42	4/15-/10/15	$6.00	E,S,D	X	
Jim's Hideaway, Dagsboro	70	70	5/18-8/15	$5.00	E,D	X	
Leisure Point Campground, Millsboro	400	0	4/1-11/1	$6.00	E,S,D	X	X
Log Cabin Hill Camping Area, Cool Spring	125	125	4/15-10/15	$6.00	E,S,D		
Pine Tree Camp Sites, Ocean View	90	25	4/17-9/30	$8.50	E,S,D	X	
Sandy Cove, Ocean View	130	30	4/1-10/15	$4.50	E,D	X	X
Shawn's Hideaway, Rehoboth Beach	67	26	4/15-10/15	$6.00	E,S,D	X	X
Steamboat Landing, Lewes	250	50	4/15-10/15	$6.50	E,S,D		X
Three Seasons Camping Resort, Rehoboth Beach	225	0	4/1-10/15	$9.00	E,S,D	X	
Treasure Beach Campground, Selbyville	513	100	5/1-10/1	$7.00	E,S,D	X	X
Tuckahoe Acres Camping, Dagsboro	500	45	5/1-10/1	$6.00	E,S,D	X	X
Other Sussex County							
Lowe's Lake View Recreation Area, Laurel	100	50	4/1-10/31	$4.00	E,S,D	X	X
Pine Haven Campsite, Milford	90	25	4/15-10/15	$5.00	E,D		
Woodenhawk Campground, Greenwood	100	100	YR	$5.00	E,D		X

KEY

D - Dumping Station
E - Electricity
S - Sewer
*For additional information see Delaware Campground Association brochure

IV. SUPPORT FACILITIES

B. CAMPGROUNDS, PUBLIC

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME AND LOCATION OF FACILITY	NUMBER OF CAMPSITES	ANNUAL OP. PERIOD	USER FEE	FACILITIES		
				UTILITIES	SNACK BAR	BOAT RAMP
New Castle County						
Bellevue State Park, Wilmington	243 acres for org. primitive camping	YR	$2.50	W		
Lums Pond State Park, Kirkwood	64	4/1-10/31	$5.00	D,W,SH	X	X
Walter S. Carpenter Jr. State Park, Newark	273 acres for org. primitive camping	YR	$2.50			
Kent County						
Killens Pond State Park, Felton	10 acres for org. recreational camping	YR	$3.00	W		
Sussex County						
Cape Henlopen State Park, Lewes	162	4/1-10/31	$5.00	D,W,SH	X	
Delaware Seashore State Park, Rehoboth Beach	299	YR	$5.00	D,W,SH	X	X
Holts Landing State Park, Millville	33 acres for org. primitive camping	4/1-10/31	$2.50	W		X

KEY

D - Dumping Station
E - Electricity
S - Sewer
W - Drinking Water
SH - Showers

Source: Delaware Department of Natural Resources and Environmental Control, Division of Parks and Recreation

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
NEW CASTLE COUNTY											
Bear											
Fairwinds Motel, Rte 40, 322-4688			$15.00								
Glen Motel, Rte 40, 834-9812	16	YR	$12.60	$14.70			X				Ef Apts
Marlex Motel, Rte 40, 322-4437	20	YR	$15.75	$15.75							
West Motel, Rte 40, 328-9755	13	YR		$13.00							
New Castle											
Del-Mar Motor Court, Rte 13, 328-9941	14	YR	$15.90	$15.90							Ef Apts
Delaware Auto Court, Rtes 13 & 40, 328-3114	25	YR		$15.00	X						Ef Apts
deVille Motel, 162 S du Pont Hwy, 328-5892	20	YR	$20.00	$20.00							
El Rancho Motel, Rte 13, 328-7377	22	YR		$17.00							Ef Apts
Gateway Motor Inn, Rtes 13 & 40, Minquadale, 328-1383	135	YR	$14.00	$26.00	X		X	X			Limo Service
General Wayne Motel, 133 S du Pont Hwy, 328-6691	50	YR	$15.00	$22.00	X		X				
Hollywood Motel, 145 S du Pont Hwy, 322-3070	25	YR	$11.00	$16.00	X						Ef Apts
Howard Johnson's Motor Lodge, New Castle Ave, 656-7771	97	YR	$19.00	$36.00	Indoor		X				Pets
Lord De La Warr Hotel, du Pont Hwy, 658-4191	147	YR	$13.00	$15.00							
New Castle Motel, du Pont Hwy, 328-7529	44	YR	$12.00	$15.00							

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	DBL. RM. RATES SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
New Castle (continued)											
Park Plaza Motel, Rtes 13 & 40, 328-7529	14	YR	$19.00	$19.00							
Quality Inn-Dutch Village, 111 S du Pont Hwy, 328-6246	41	YR	$22.00	$26.00	X		X				Ef Apts
Ramada Inn, Rtes 13 & I-95, 658-8511	135	YR	$22.00	$29.00	X		X	X	X	X	
Sid Polish's Cozy Cabin, Rte 40, 328-9375											
Skyways Motor Lodge, Rte 13 328-6666	100	YR	$16.00	$24.00	X	X	X	X			Shuffleboard
Tremont Hotel, Rtes 13 & 40 328-6211	30	YR	$14.00	$24.00	X						
Newark											
Clay's Motel, Rte 40, Glasgow 834-3400	25	YR	$16.00	$21.00	X						Playground
Holiday Inn No 2, Rtes 273 & I-95, 737-2700	144	YR	$28.50	$34.00	X		X	X	X	X	Kennel
Howard Johnson's Motor Lodge, Rtes 896 & I-95, 368-8521	100	YR	$30.00	$31.00	X		X	X			Rms for Handicapped
Iron Hill Inn Motor Lodge 1120 S College Ave, 368-8715	100	YR	$26.00	$30.00	X		X	X		X	Waterbeds, Steambath
Motel Glasgow, Rte 40, Glasgow, 368-0223	5	YR	$12.72	$12.72							
Newark Travelodge, 268 E Main, 737-5050	48	YR	$16.23	$23.00	X						Pets

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Newark (continued)											
Sheraton Inn-Newark, Rtes 273 & I-95, 738-3400	101	YR	$30.00	$32.00	X		X	X	X	X	
Odessa											
Deer Place Motel, P.O. 91 378-9948											
Parkway Motor Court, Rte 13, 378-9852	10	YR	$10.00	$14.00							
Pleasant Hill Motel, Rte 13, 378-2468	13	YR	$12.00	$14.00							
Townsend											
Fieldsboro Motel, Rte 13, 378-9215	10	YR	$16.00	$18.00							
Wilmington and Brandywine Hundred Area											
Brandywine Hilton, I-95 Exit 11, 792-2701	196	YR	$32.00	$41.00	X		X	X	X	X	
El Capitan Motor Hotel, 1807 Concord Pike, 656-9436	59	YR	$21.00	$26.00	X						
Holiday Inn No 1, 4000 Concord Pike, 478-2222	140	YR	$21.00	$35.00	X		X	X			Kennel
Hotel du Pont, 11th & Market, 656-8121	300	YR	$29.00	$38.00			X	X	X		Valet Garage

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Wilmington and Brandywine Hundred Area (continued)											
Kent Manor Motel, Du Pont Hwy, 656-9431	80	YR		$18.00			X				
Milan Motel, 3306 Philadelphia Pike, 798-6601	19	YR		$14.00							
Prints Motel, Governor Prints Ave, 764-8190	11	YR		$14.00							
Raceway Motel, 5510 Concord Pike, 478-2400	13	YR		$12.00	X						
Radisson, 700 King St, 655-0400	222	YR		$62.50	Indoor		X	X	X	X	
Sheraton-Brandywine Inn, 4727 Concord Pike, 478-6000	154	YR	$26.50	$35.00	X	X	X	X	X	X	Ef Apts, Pets
Valley-Go Motor Lodge, Rte 201 & Naamans Rd, 478-5718	106	YR	$18.00	$22.00	X		X				

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
KENT COUNTY											
Dover											
Best Western Capitol City Lodge, Rte 13, 678-2160	40	YR	$14.00	$20.00	X						Laundry
Caravan Motel, 383 N du Pont Hwy	65	YR	$19.50	$19.50	X						
Dover Inn-Best Western, 561 N du Pont Hwy, 678-8900	141	YR		$26.00	X		X	X	X	X	
Haynie's Motel, 1760 N du Pont Hwy, 734-4042	8	YR	$12.72	$11.66							
Holiday Inn, 348 N du Pont Hwy, 734-5701	154	YR	$15.00	$31.00	X		X	X	X	X	Kennel
Quality Inn, Rte 13 & Loockerman St, 674-3300	93	YR	$19.00	$20.00	X		X	X	X		Pets
Shamrock Motel, 2171 S du Pont Hwy, 697-7505	8	YR		$12.00				X	X	X	Pets
Sheraton Inn-Dover, 1570 N du Pont Hwy, 678-8500	144	YR	$17.00	$50.00	X	X	X	X	X	X	
Tea Kettle Motel, 1517 N du Pont Hwy, 734-2453	9	YR	$10.00	$14.00							
Towne Point Motel, du Pont Hwy, 734-5793	50	YR	$11.00	$18.00	X						Playground
Felton											
Cora Ann's Motel, Rte 13, 284-4074	5	YR	$ 7.00	$ 7.00							
Friendly Motel, Rte 13, 284-9988	6	YR	$12.00	$12.00							
Poynter's Motel, Rte 13, 284-4588	12	YR	$12.00	$12.00							

IV. SUPPORT FACILITIES

C. MOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO. OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Milford											
Kent & Sussex Motor Inn, 24 NW Front Street, 422-4551	10	YR									
Traveler's Inn, Rte 113, 422-8089	35	YR		$26.00							
Smyrna											
Twilight Haven Motel, du Pont Hwy, 653-9906	6	YR	$17.00	$17.00							
Whaley's Motel, du Pont Hwy, 653-0154	14	YR	$18.00	$18.00							

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
SUSSEX COUNTY											
Bethany Beach											
Addy Sea, Atlantic Ave & Ocean View Pkwy, 539-3707	15	S	$32.00	$40.00			X				Restored Victorian Mansion, Beach
Bethany Arms Motel & Apts, Atlantic Ave & Hollywood, 539-9603	42	S	$28.00	$34.00							Beach
Blue Surf Motel, Boardwalk, 539-7531	36	S	$30.00	$42.00							Beach
Nomad Village, Tower Shores, 539-7581	22	S		$35.00				X			Ef Apts, Beach, Water Slide
Russell Inn, Del Ave & 4th, 539-7878											
Sea Colony Condominiums, 539-6961	943	YR	Week and Weekend rates available		X	X					Health Room, Tennis/Sea Villas, High-rise/Garden Suites
Sea Crest Lodge, Garfield Parkway, 539-7621	14	S	$18.00	$30.00							Beach
Summer Place Motel, Ocean Hwy, 539-7566	55	YR	$18.00	$43.00	X						Miniature Golf
Westward Pines, Kent Ave, 539-7426	7	S		$28.00							
Fenwick Island											
Casa Mia Apartments, Ocean Hwy, 539-9435	8	S		$250.00/wk							
Ebb Tide Apartments, West Virginia & Bunting, 539-7140	8	S									

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Fenwick Island (continued)											
Fenwick Sea Charm, Bunting Ave, 539-9613	36	S	$20.00	$38.00							Beach
Mason-Dixon Motel, Ocean Hwy & Lighthouse Rd, 539-7673	23	S	$27.00	$37.00							Beach
Ric-Mar Apt Motel, Bunting Ave, 539-9591	13	YR	$31.00	$31.00							Ef Apts, Beach
Sands Beach Resort Motel, Ocean Hwy, 539-7745	37	YR	$16.00	$38.00	X						Beach, Jacuzzi
Seaside Motel, Ocean Hwy, 539-7684	29	S	$18.00	$34.00	X						Ef Apts, Beach
Tingle's Motel, Ocean Hwy, 539-7745	38	S	$16.00	$30.00							
Georgetown											
Classic Motel, du Pont Hwy, 856-7532	15	YR	$16.00	$20.00							
Greenwood											
Holiday Motel, Rte 13, 349-4270											
Laurel											
Diamond Motel, Rte 13, 875-7569	15	S	$13.00	$16.00							
Dutch Courts Motel, South Central Ave, 875-9945											

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO O UNITS	ANNUAL OP. PERIOD	DB., RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Laurel (continued)											
Lakeside Motel, Rte 13, 875-3244											
Laurel House, Market St & Central 875-9942											
Lewes											
Angler's Motel, Savannah & Angler's Rd, 645-2831	25	S	$22.00	$32.00							
Breakwater House, Bay Ave & Market St, 645-6069	15	S									
Cape Henlopen Motel, Savannah Rd, 645-2428	15	YR	$15.00	$30.00							
Love Creek Motel, Angola, 945-9965											
Ocean House, Savannah & Bay Rds, 645-9137	25	YR	$30.00	$65.00							
Red Mill Motel, Red Mill, 645-9736	16	YR	$25.00	$25.00							
Stan-Moore Arms, Savannah Rd, 645-9951	6	YR	$14.00	$25.00							Ef Apts
Valley of the Swans Motel, 2nd & Market, 645-6466											Ef Apts
Vesuvio Motel, Savannah Rd, 645-2224	15	S	$18.00	$35.00							
Millsboro											
Hickman's Motel, Rte 113, 934-8091	25	YR	$21.00	$26.00							
Rosedale Beach Motel, Rte 24, 945-9915	32	S		$20.00							Boat Ramp

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Ocean View											
Surf Side Motel & Trailer Park, Indian River Inlet, 539-7209	3	YR	$20.00	$20.00							
Rehoboth Beach and Dewey Beach											
Adams Ocean Front Motel, Read St, DB, 227-3039	22	S	$22.00	$40.00	X						Beach
Airport Motel, Rte 1, RB, 227-6737	8	YR	$20.00	$31.00							
Anchorage Motor Court Inn, Lewes-Reh Hwy, RB, 645-8320	20	S	$16.00	$28.00							
Atlantic Sands, Boardwalk & Baltimore, RB, 227-2511	89	S	$20.00	$40.00	X		X				
Atlantic View Motel, Clayton St, DB, 227-3878		S			X						Beach
Bellboy Motel, Van Dyke, DB, 227-6000	16	S	$18.00	$35.00							
Blue Poodle Guest House, Delaware Ave, RB, 227-2419	8	S		$28.00							
Breakers Motel, 2nd & Baltimore, RB, 227-6688											
Carmas Lane Motel, Washington St, RB, 227-2434	11	YR	$22.00	$27.00							
Cedar Court Motor Inn, Rte 1, RB, 645-8355	18	YR									
Colonial Oaks Motel, Rte 1, RB, 645-2929	12	S	$18.00	$35.00	X						
Commodore Motel, 50 Rehoboth Ave. RB, 227-9446	82	S			X						

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LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Rehoboth Beach and Dewey Beach (continued)											
Corner Cupboard Inn, Park Ave, RB, 227-8553		S					X				
Cove Resort Motel, Van Dyke Ave, DB, 227-4467	40	YR	$20.00	$32.00	Indoor						Beach, Saunas, Gym, Playground
Dinner Bell Inn, Christian St, RB, 227-2561	26	S	$25.00	$39.00			X	X		X	Gift Shop
Fountain Motel & Efficiencies, Rte 1, Rb, 227-2966	24	S	$16.00	$26.00	X						Beach
Frances Anne Motel, Rehoboth Ave, RB, 227-7595	15	S		$30.00							Beach
Henlopen Motel, Boardwalk, RB, 227-2551	89	YR	$20.00	$48.00		Nearby	X	X	X	X	Beach
Hobo Beach Motel, Clayton St, DB, 227-2504	45	S			X						Beach, Snack Bar
Killen's Motel, Bay Rd, RB, 227-7662	11	YR	$15.00	$20.00							
Lochmere, Silver Lake Dr, RB, 227-2536	6	YR	$18.00	$30.00							Ef Apts
Lord Baltimore Lodge, Rehoboth Ave, RB, 227-2855	12	YR	$15.00	$25.00							
Mallorys' Motel, Rehoboth Ave, RB, 227-8092	16	S									
Midway Motor Lodge, Box 2801), Rb, 645-8150	20	S	$18.00	$28.00							
Oak Grove Motor Court, Rehoboth Ave, RB, 227-7156	20	S	$18.00	$28.00							
Oceanus Hotel, Second St, RB, 227-9436	38	S	$30.00	$45.00	X						

IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	DBL. RM. RATES SP/FALL SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENT
Rehoboth Beach and Dewey Beach (continued)										
Patrician Towers, 8 Olive St, RB, 227-8821	52	S			X					
Pickwick Oceanfront, Philadelphia & Boardwalk, RB, 227-7507					X					
Pine 'N Brine Efficiencies, 1st & Maryland, RB, 227-7544	21									
Pirates Cove Motel, 625 Rehoboth Ave, RB, 227-2844	12	YR								
Pleasant Inn Lodge, 1st & Olive, RB, 227-7311	44			$22.00						
Redwood Motel, Rte 1, DB, 227-2702	20	S								
Roope's Cottages & Motel, Grover & 6th Sts, RB, 227-7858	32	S	$16.00	$38.00						
Royal Surf Motel, Reed & Ocean DB, 227-7059	16									
Sandpiper, Baltimore Ave, RB, 227-2103	30	S	$20.00	$35.00						
Sea Esta Motel, Ocean Hwy, DB, 227-7666	10	YR	$21.00	$26.00						
Sea Lodge, 15 Hickman, RB, 227-7074	21	S	$20.00	$35.00		X				
Sea Ranch Motel, Rte 1, DB, 227-8609	18	YR	$20.00	$32.00						
Shirl Ann Motel & Apts, Board-walk & Olive, RB, 227-7169										

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IV. SUPPORT FACILITIES

C. HOTELS & MOTELS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	NO OF UNITS	ANNUAL OP. PERIOD	DBL. RM. RATES SP/FALL WINTER	SUMMER	POOL	TENNIS	REST-AURANT	BAR	MTG. FAC.	ENTER.	OTHER
Rehoboth Beach and Dewey Beach (continued)											
Sirocco Motel, Baltimore & Boardwalk, RB, 227-9324	18	S		$35.00							Beach
Southwinds Motor Court, Rte 1 & McKinley, DB, 227-7800	20	S	$16.00	$33.00							
Sun View Motel, Wilmington & Boardwalk, RB, 227-3651	16	S	$25.00	$30.00							Beach
Yellow House, 30 Olive Ave, RB, 227-8836											
Seaford											
Motel Seaford, Seaford Hwy, 629-9061	19	YR	$13.00	$17.00	X						
Motel Sussex, Seaford Hwy, 629-4591	14	S	$15.00	$20.00	X						
Sunrise Motel, Rte 13, 629-5511	22	YR	$14.00	$18.00							

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IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
NEW CASTLE COUNTY AND WILMINGTON									
Bear									
Lating Post, Rte 40, 834-9822	50	M-S	8a-9p	YR	$2.35-$4.95				
Delaware City									
Betty's Restaurant, 126 Clinton, 834-4545	25	M-S	5:30a-2p	YR					
Middletown									
Bea's and Ed's Restaurant, 104 W. Main, 378-8515	60	7	7a-12n	YR		$2.90			
The Brick House, 1 N Scott St, 378-4626	50	Closed M	11a-10p	YR	$2.50-$4.50	$8.00-$12.00	X		X
New Castle									
Arsenal-on-the-Green, Market St, 328-8734	100	7	11a-10p	YR	$2.50-$3.75	$3.75-$8.75	X	X	X
Crab Shack, 130 S du Pont Hwy, 322-2411		7	11a-10p	YR	$3.75	$14.95	X		X
Flight Deck Restaurant, Wilm Airport, 328-0444	150	7	6a-1A	YR	$1.75-$3.50	$4.00-$8.00	X	X	X
Hom's Garden Restaurant, Community Plaza, 328-6150		7	11a-10p	YR	$2.00-up	$3.50-up	X		
Howard Johnson's, 113 S du Pont Hwy, 328-9866		7	All Day	YR			X		
Howard Johnson's, Del Mem Br & New Castle Ave, 652-9592	115	7	All Day	YR			X		

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IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING, BNQT. RM.
New Castle (continued)									
Jack's Town & Country Diner, Rte 13 & Tybouts Corner, 834-1392					$1.25-$3.50				
Lestardo's Crab House, Rte 273 & Pranys Ln, 328-5070	104	7	9a-1A	YR	$3.95-$6.95				
Lynnhaven Inn, 154 N du Pont Hwy, 328-2411		7	11:30a-10p	YR	$5.50	$11.75	X		
Manetti's Italian Restaurant, Penn Mart Shop Ctr, 322-3965	40	6	11a-10p	YR	$4.50				
Perkins Cake & Steak, 196 N du Pont Hwy,		7	6a-9p (M-Th)	YR					
Perri's Italian Restaurant, Colns Pk Shop Ctr, 654-3037	75	7	All Day (M-Th) 9a-9p	YR	$.80-$8.50		X		
Ramada Inn, Rtes, 13 & I-95, 658-3848									
Spirit of '76 Restaurant - Skyways Qual Inn, 322-4487		7		YR			X		X
Wooden Nickel, Manor Pk Shop Ctr, 322-1732	60	7	11a-9p	YR			X		
Newark									
Banberry's - Sheraton Inn, Rtes 273 & I-95, 738-3400		7	6:30a-10p	YR	$5.75				
Casablanca, 21 Choate St, 366-0710		7	11a-10p	YR	$1.95	$9.50	X	X	
Colony Inn, Brookside Shop Ctr, 738-4000		7	11a-12A	YR	$4.00	$12.00	X	X	X
Down Under Restaurant, 60 N College Ave, 366-9841	120	7	11a-1A	YR	$2.00-$5.00	$8.50	X	X	X
The Dragon Den, 302 E Cleveland Ave, 738-0808							X	X	

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Newark (continued)									
El Sombrero, 160 Elkton Rd, 738-0808									
The Glasgow Arms, Rte 40, Glasgow, 368-4729		Closed Su	11.30a-9:30p	YR	$2.50	$4.50	X		
H.A. Winston's, Elkton Rd, 737-2222	130	7	11a-12A	YR	$1.95	$5.95	X		
Hidden Hearth Inn, 270 E Main, 737-7277	80	7	7a-9p	YR			X		
Horseless Carriage - Holiday Inn No. 2, Rtes 273 & I-95, 737-2899									
Howard Johnson's, Rtes 896 & I-95, 366-9535		7	24 Hrs	YR			X		X
Iron Hill Inn, 1100 S College Ave, 368-8531		7	6:30a-10p		$4.00	$10.00	X		X
Jimmy's Diner, E Main St, 368-8338	88	6	5:45a-8:30p	YR					
Old World Restaurant & Pizzaria, Polly Drummond Ctr, 731-8297	75	6	11:30a-9:00p	YR	$1.50	$4.95	X		
Pantolone's Meadowood Inn, Kirkwood Hwy, 737-3674		7	11a-12A	YR	$3.95	$10.00	X	X	X
Perkin's Pancake House of Delaware, Kirkwood Hwy, 737-3500	175	7	7:00a-8:00p	YR	$1.75	$4.50			X
Reflections Tavern, Possum Park Mall, 366-9853	150	Closed Su	11:30a-9:30p	YR	$1.50	$8.95	X	X	
The Village Pub, Prestbury Square, 731-1016	125	6	11a-1p	YR	$1.50		X		X
Wing Wah, Chestnut Hill Plaza, 366-9496		7	11a-10p	YR	$3.75	$10.00			
Odessa									
Hearth Restaurant, 378-9901									

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IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Wilmington and Brandywine Hundred Area									
The Back Stage Restaurant, 210 W 10th St,		7	11a-8p	YR	$1.60	$3.00	X		X
The Barn Door, 845 Tatnall St, 655-7749		Closed M	10a-10p	YR	$2.25-$4.25				
Blue Boar Inn, Millers Road		7	9a-1A	YR	$1.95-up		X		
Blue Lantern Lounge, Kirkwood Hwy, 998-4790		7	7a-10p	YR	$2.25-$4.25	$4.25-$11.25	X	X	X
Brandywine Hilton, Naamans Rd & I-95, 792-2701		Closed Su	6p-11:30p	YR	$4.00-up	$10.95-up	X		X
Brandywine Room - Hotel du Pont, 11th & Market Sts, 656-8121		7	10a-12A	YR	$1.50-$3.50	$1.50-$3.00			
The Buggy Tavern, 1705 Marsh Rd, 478-7559		Closed Su	11a-9:30p	YR	$1.50-$3.50	$4.25-$11.50	X		
Candelight Room, 2401 Penn Ave, 656-6788	46	7	7a-10p	YR		$6.95-$12.95	X	X	X
Canterbury Room - Brandywine Sheraton, Concord Pike, 478-6000		7	11a-1A	YR	$1.50-$4.00	$3.10-$9.00	X		X
Carpenter Station Restaurant, 2314 Carpenter Rd, 475-6113	175	7	7a-12A	YR		$5.00-$11.00	X	X	X
Chuck Wagon, 4301 Kirkwood Hwy, 998-2124									
Claymont Inn, Governor Prints Blvd, 798-9875									
Claymont Steak Shop, 2526 Phila Pike, 798-5319		Closed Su	11a-10p	YR	$2.50-$5.50	$4.75-$10.25			
Columbus Inn, 2216 Penn Ave, 571-1492		Closed Su	11a-1A	YR	$1.50-$4.25	$3.75-$8.75	X	X	
Constantinou's House of Beef, 1616 Del Ave, 652-0653		7	10a-10p	YR	$3.75	$6.50-$8.50			
Crepe Chalet, 105 W 9th St, 658-2101	85								

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Wilmington and Brandywine Hundred Area (continued)									
Del Rose Cafe, 1707 Del Ave, 656-3015			11a-10p	YR					
DiNardo's, 405 N Lincoln, 656-3685		Closed Su	11a-11p	YR			X		
Drummer's Table, 3215 Kirkwood Hwy, 998-1998		7	11a-11p	YR			X		X
Dutch Pantry - Holiday Inn No 1, 4000 Concord Pike, 478-2222									
Executive Inn, 104 W 9th St, 658-1652									
Farmer in the Dell, Naamans Rd, 998-0581		7	11a-11p	YR	$3.00	$6.50			X
The First Place, 1707 Marsh Rd, 478-4932		7	11a-11p	YR					X
Five Points Restaurant, 101 N Maryland, 652-9888		Closed Su	8a-11p	YR			X		
Gallucio's Cafe, 1709 Lovering, 652-2007		7	10a-1A	YR	$1.25	$3.00	X	X	X
Gamiel Bros Delicatessen, 13 E 7th St, 655-2748	1,000	7	10a-10:30p	YR	$1.95	$7.95	X		X
Gatsby's, Kirkwood Hwy, 998-0211		7	11a-1A	YR			X	X	X
Govato's, 8th & Market Sts, 652-4082			8a-6p	YR	$.75-$3.25		X	X	X
Graylyn Restaurant, 1708 Marsh Rd, 478-3626	72	Closed Su	6a-8p	YR	$2.75	$5.25	X		
Green Room - Hotel du Pont, 11th & Market Sts, 656-8121		Th-Su	7a-6p	YR	$4.00-up	$10.95-up	X	X	X
The Greenery, 410 Market St, 652-1401		7	7a-6p	YR	$2.00-$4.00		X		
H. A. Winston's, Independence Mall, 571-8883	130	7	11a-1A	YR	$2.50-$6.00		X		
Haberdashery - Radisson Wilm, 700 King St, 655-0400		7		YR			X	X	X
Harvey's Restaurant, 3211 Concord Pike, 478-9425		Closed Su	11a-12A	YR	$1.50-$3.95	$4.50-$13.00	X		X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
Wilmington and Brandywine Hundred Area (continued)									
Hayasi, 2208 Millers Rd, 475-7209		7	11a-11p	YR	$2.00-$3.00	$4.00-$7.00	X		
Hearn's Restaurant, 2008 Market St, 654-3322		7	11a-10:30p	YR			X		X
Helen's Restaurant, 800 Lombard, 652-9770		7	6a-6p	YR					
Hideaway Lounge, Ebright Rd, 475-9884		7	11a-12A	YR	$1.25	$2.25	X	X	X
Hitching Post, 1012 Wilm Ave, 998-9786		7	11a-12A	YR					
House of China, Tri-State Mall, 798-6638	120	7	11:30a-10p	YR	$3.50	$10.00-up			X
House of HSU, 2815 Phila Pike, 798-0142									
Howard Johnson's, 1811 Concord Pike, 655-1348		7	7a-10p	YR	$1.25-$3.50	$3.50-$8.50			
Howard Johnson's, 4595 Kirkwood Hwy, 998-9368									
Howard Johnson's, Naamans Rd & I-95, 798-9813									
Ivystone Restaurant, 4542 Kirkwood Hwy, 999-1278		7	7a-10p	YR			X		X
Jack Lundy's, 3604 Millers Rd, 764-5036		7	10a-8p	YR	$1.50-$5.00	$1.50-$5.00	X		X
Katie's Restaurant, 6th & Scott Sts, 652-9515		7	11a-11p	YR	$2.50	$5.90	X		
Kent Manor Inn, du Pont Hwy, 658-7197									
Kettle and Keg Restaurant, 4000 Concord Pike, 478-6037									
Le Grand Tier, 820 Market St Mall, 571-8541		7	2:30p-12A	YR		$6.00-$10.00	X	X	X
Leone's Towne Talk, 213 W 11th St, 654-7376		Closed Su	11:30a-10p	YR		$5.50-$14.95	X		X
Leoune's at the Mansion, 64 Bancroft Estate Rd, 658-5266		Closed Su	11:30a-10:30p	YR	$2.95-$6.95	$7.75-$10.50	X		X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
Wilmington and Brandywine Hundred Area (continued)									
Lion's Den, 4015 Concord Pike, 478-9848		Closed Su	11a-12A	YR	$3.00	$7.00	X	X	X
Magic Wok, 2105-A Concord Pike, 655-4595		7	11a-9p	YR			X		
Marconi's Restaurant, 1900 Lancaster Ave, 652-9958		7	11a-12A	YR	$2.75	$5.95	X	X	X
Merrie House, Tri-State Mall, 798-7586		7	11a-9p	YR	$2.50	$6.50			
Mr. Steak, Kirkwood Hwy, 994-5502		7	11:30a-10p	YR			X		
The Niblick, 1710 Center Rd, 999-1111									
Ocean's Harvest Seafood, Penn Ave, 798-9721									
Oscar's, 703 Market St, 656-8044		7	11a-12A	YR	$.80-$4.00		X	X	X
Park Restaurant, 3 Winston Ave, 652-9961		Closed Su	11:30a-9p	YR	$1.50-$3.25		X		
Picciotti's, 1641 W 4th St, 652-3563	150	7	6a-10p	YR	$3.95	$3.95	X		X
Presto Restaurant, 817 Market St, 652-8024									
Printz Grill, Northeast Blvd, 652-8971									
Ranch House, 4003 Concord, 475-2300		7	7:30a-9p	YR		$5.50-$14.00	X	X	X
The Rathskeller, 837 Market St, 654-0200	75	7	11a-11p	YR		$3.25-$8.95	X		X
Remedio's Restaurant, Lancaster Ave, 652-3451		7	11:30a-10p	YR			X		
Robino's, 520 N Union St, 652-9223							X	X	
Royal Exchange, Branmar Shop Ctr, 475-5684		7	7a-3p	YR	$2.00-$5.00				
Salad Cellar, 904 Shipley St, 652-2221		6	11a-10p	YR	$2.00	$6.55	X		
Silk Purse, 1307 N Scott, 654-7666	85	7	7a-10p	YR	$1.50	$4.00			
Theo's Restaurant, 1001 West St, 655-4489			11a-10p	YR			X		X
Town House, 913 Shipley St, 656-1254									

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Wilmington and Brandywine Hundred Area (continued)									
Town Wharf, 835 N Market St, 571-8776	120	7	11a-10p	YR	$2.50-$4.00	$5.95-$7.00	X		
Wing Wah, 3901 Concord Pike, 478-9500	175	7	11a-12A	YR	$3.95	$14.00	X		
Winkler's, 15th & French Sts, 655-5322		7	11:30a-1A	YR	$2.50-$4.00	$5.95-$7.00	X	X	X
Yetter's Restaurant, 3101 Phila Pike, 798-9906	50	6	10a-12A	YR	$2.50	$6.50	X		

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
KENT COUNTY									
Dover									
Blue Coat Inn, 800 N State St, 674-1776	235	Closed M	11:30a-10:30p	YR	$2.25-$4.25	$4.75-$10.95	X	X	X
Brass Bull, Rte 13, 678-9938	100	7	7a-10p	YR	$1.25-$5.95	$4.95-$10.95			
Brinelli's Restaurant, W Walker Rd, 674-1208	100	7	9a-1A	YR	$1.50-$6.50	$2.50-$6.50	X	X	X
Bull N Bottle - Dover Inn, 561 N du Pont Hwy, 678-8900	120	7	7a-10p	YR	$2.25-$4.25	$4.75-$10.95	X	X	X
Capt John's Pancake House, 518 Bay Rd, 678-8166				YR					
China Garden, 1711 S du Pont Hwy, 674-6768				YR					
Coral Reef, Little Creek, 678-9175	230	7	11a-10p	YR	$2.25-$4.35	$4.50-$11.25	X		X
Dinner Bell Inn, 121 S State St, 678-1234	375	Closed Su	11a-10p	YR	$2.25-$5.95	$5.25-$10.50	X	X	X
El Sombrero, 913 S du Pont Hwy, 678-9445	70	7	11a-11p	YR	$1.00	$5.75	X		
Gilligan's - Sheraton Inn, 1570 N du Pont Hwy, 678-8500	200	7	7a-10p	YR	$2.50-$5.00	$4.25-$11.25	X	X	X
The Gold Key, Treadway Towers, E Loockerman, 678-2583	250	Closed Su	11a-10p	YR	$2.25-$4.50	$4.50-$10.50	X		
Holiday Inn, 348 N du Pont Hwy, 734-5701	100	7	7a-10p	YR	$2.25-$4.00	$3.50-$9.50	X	X	X
Howard Johnson's, Rte 13, 674-1212	60	7	All Day (M-S)	YR	$1.25-$3.50	$3.50-$8.50	X		
Hub Restaurant, Rte 13, 734-7551	550	7	6:30a-10p	YR	$1.75-$3.75	$5.95-$12.95	X	X	X
Iron Gate Inn, Rte 113, 678-9666		Closed M	11a-10p	YR					

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
Dover (continued)									
Kirby & Holloway Family Restaurant Rte 13, 734-7133	175	7	6a-10p	YR	$2.0[illegible]	$4.45			
The Nuts, 1060 S State St, 678-0988	50	7	11:30a-11p	YR	$2.25-$4.50	$8.00-$15.00	X	X	
Orient Express, Rte 113		7	11a-10p	YR			A		
Pappy's, Rte 13 - Dover Mart, 674-1890	205	7	11:30a-11:30p	YR	$.95	$5.25	X		X
Perry's Sizzling Steak House, Rte 13, 674-2230	250	7	11a-11p	YR	$1.95-$6.95	$2.79-$6.95	X		X
Roma Italian Restaurant, Rte 113, 678-1041	94	Closed M	11a-12A	YR	$3.50	$13.50	X		
The Side Door, S Governor's Ave, 678-8878				YR			X	X	
Village Inn, Little Creek, 734-3245	150	Closed M	11a-10p	YR	$2.50-$4.50	$4.25-$10.50	X		X
Leipsic									
Sambo's Tavern, 674-9724	250	Closed Su	9a-1A	MAR-NOV		$2.50-$8.50	X		
Milford									
Capt John's Family Restaurant Rte. 113, 422-4210	140	7	9:30a-10p	YR	$3.00	$8.50			
Geyer's Restaurant, Rte 113, 422-5327	120	Closed Su	9:30a-9p	YR	$3.50	$10.50			X
Leoune's Restaurant, Rte 113, 422-5836		Closed Su		YR			X		
Oliver's Meeting House, 227 N Rehoboth Blvd, 422-3363	70	6	11a-10p	YR			X		X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Smyrna									
Council's Hunting Lodge, Bayview Rd. 653-6962	120	Closed Su	9:30a-9p	YR	$3.50	$10.50			X
Thomas England House, Rte 13, 653-8549	175	Closed Tu	11a-10p	YR	$2.25-$4.50	$4.25-$11.75	X	X	X
Wagon Wheel, Rte 13, 653-9903		7	24 Hrs	YR					
The Wayside Inn, Rte 13, 653-8047	200	Closed M	11a-10p	YR	$2.50-$4.50	$2.25-$10.50	X		
Wyoming									
Anthony's Restaurant, 108 N Railroad Ave, 697-7448		6	6:30a-8p	YR	$2.35	$5.00			X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
SUSSEX COUNTY									
Bethany Beach									
Bethany Inn Restaurant, Garfield Pkwy, 539-9818	68	/	8a-9:30p	MEM D-LABOR D	$2.00	$7.00			X
Cafe des Crepes, Ocean Hwy, 539-4722	70	7	11a-3:00p	YR	$3.50	$8.95	X		
Gi Gi Restaurant, Bethany Mall, 539-3360	80	7	8a-11p	MEM D-LABOR D	$1.25	$3.95			
Holiday House, Boardwalk & Garfield, 539-7298				YR			X	X	
Sinbad Inn, Ocean Hwy, 539-3353									
Tower Shores, Ocean Hwy, 539-4118	50	7	7a-11p	S					
Bridgeville									
Bridge House Restaurant, 101 Market 337-7988	50	6	5:30a-6p	YR	$2.85	$3.50			
Ellendale									
Mildred's Country Kitchen, Main & State Sts, 422-7944		7	7a-8p	YR			X		X
Truxon's Restaurant, Rtes 113 & 16, 422-6765	75	7	24 Hrs	YR	$2.00	$3.95			X
Fenwick Island									
Fenwick Crab House, Ocean Hwy, 539-9842	225	7	11a-10p	MEM D-LABOR D					X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
Fenwick Island (continued)									
Libby's Restaurant, Ocean Hwy, 539-7379	230	7	7a-9p	S			X		
Lighthouse	200	7	11a-1A	YR			X	X	X
Warren's Family Restaurant, Ocean Hwy, 539-7156	150	7	8a-9p	S					
Greenwood									
Dillard's Rte 13, 349-4023									
Laurel									
The Dutch Inn, Rte 13A, 875-2500		7	7a-6p	YR			X		X
Lewes									
Anglers Restaurant, Anglers Rd, 645-9931	100	7	8a-11p	YR	$4.95	$9.95	X		X
DeBraak Inn, Savannah & Bay Front 645-2271		7	11a-11p	YR			X	X	X
Florio's Restaurant, 111 Bark, 645-9216									
Greenery Restaurant, 424½ King Hwy, 645-8501	30	7	6a-8p	YR	$3.00	$4.00			
Lou Ianire's Restaurant, Canal Bank, 645-9497	200	7	9a-1A	YR			X	X	X
Wes' Harbor House Restaurant, Savannah & Canal, 645-6211	75	7	4a-9p	YR	$2.50	$4.95			
Wheel House, 3 E Bay Ave, 645-6791				YR					

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM.
Millsboro									
River House Restaurant & Inn, 945-9957	450	7	4a-9p	YR	$2.50	$4.95	X	X	
Sam's Restaurant, State St, 934-9943		M-S	6a-8p	YR					
Ocean View									
Topside Restaurant, Central Ave, 539-7983	450	7	11a-11p	YR			X		
Warehouse Restaurant, Cedar Neck Rd, 539-5671		7	11a-11p	YR			X		
Rehoboth Beach and Dewey Beach									
Adriatico Ristorante, 1st & Baltimore, RB, 227-9255		7	8a-11p	YR			X	X	X
Ann Marie's Italian Restaurant, 2nd & Wilm Aves, RB, 227-6950									
Avenue Restaurant, 32 Rehoboth Ave, RB, 227-2770	380	7	9a-9p	YR			X		X
Back Porch Cafe & Raw Bar, 21 Rehoboth Ave, RB, 227-3674	100	7	9a-1A	S	$1.95-$4.75	$6.95-$13.95	X	X	
Boat House, Bellevue & Bayard, DB, 227-7337		7	11a-1A	YR	$3.00	$6.00	X	X	
Camel's Hump, 21 Baltimore Ave, RB, 227-6933		7	11a-2A	S					
Club One, Rte 14, RB, 227-2244				YR			X	X	
Corner Cupboard Inn, 50 Park Ave, RB, 227-8553		7	8a-10p	S					
Country Squire Restaurant, 5 Rehoboth Ave, RB, 227-3985	110	7	8a-1A	YR	$1.00-$3.00	$4.00-$7.00	X		

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE LUNCH	PRICE RANGE DINNER	FACILITIES BAR	FACILITIES ENTER-TAINMENT	FACILITIES MEETING/ BNQT. RM.
Rehoboth Beach and Dewey Beach (continued)									
The Crab House, Rte 14, RB, 227-2201	140	7	12p-12A	S			X		
Crab Shack, Rte 1, DB, 227-2131									
Dagwood's, 63 Rehoboth Ave, RB, 227-4188	59	7	9a-1A	S	$1.75-$3.50	$5.95-$10.95	X	X	
Delaware Room, 4 Rehoboth Ave, RB, 227-9906	150	7	7a-10p	YR				X	
Dinner Bell Inn, 2nd & Christian, RB, 227-2561	225	7	8a-10:30p	S			X	X	X
Fran O'Brien's Beach House, 59 Lake Ave, RB, 227-6121		7	11a-1A	YR			X	X	
Grotto Pizza, 12 Rehoboth Ave, RB, 227-8978	215	7	11a-2:30A	YR	$1.50	$8.00	X		
Gus' Steak House, Rte 14 & Read, DB, 227-6312	52	7	8a-12A	YR					
H.A. Winston's, Rte 14, RB, 227-4701									
Happy Crab, Rte 1, RB, 227-2225		7	11:30a-10p	YR			X	X	
Homestead Restaurant, 93 Rehoboth Ave, RB, 227-9737	200	7	7a-9p	S			X		
Kelly's, 112 Rehoboth Ave, RB, 227-7655		7	12n-10p	S			X		
Lamp Post Restaurant, Rte 1, RB, 645-9132			8a-10p	YR			X		
Nice N Easy, 52 Wilm Ave, RB, 227-6400		7	11a-1A	S					
Nick's Pizza, Wilm Ave & Boardwalk, RB, 227-8882	40	7	9a-1A	S					
Nicola Pizza, 8 N 1st St, RB, 227-6211	42	7	11a-3A	S					
Pappy's, 29 Rehoboth Ave, RB, 227-9418	280	7	11a-12A	YR			X	X	X

IV. SUPPORT FACILITIES

D. RESTAURANTS

LOCATION BY COUNTY AND SUB-COUNTY AREAS

NAME, ADDRESS AND PHONE # OF FACILITY	SEATING CAPACITY	DAYS OPEN	HOURS	ANNUAL OP. PERIOD	PRICE RANGE		FACILITIES		
					LUNCH	DINNER	BAR	ENTER-TAINMENT	MEETING/ BNQT. RM
Rehoboth Beach and Dewey Beach (continued)									
Pizza Villa, Midway Shop Ctr, RB, 645-2022	24	7	1p-12A	YR					
Rehoboth Inn, 94 Rehoboth Ave, RB, 227-2740		7	5p-1A	YR					
Robin Hood Restaurant, 20 Rehoboth Ave, RB, 227-9770	90	7	24 Hrs	MAR-DEC	$1.00-up	$2.95-up			
Rusty Rudder, Dickinson St, DB, 227-3888		7	11a-1A	YR	$3.00-$6.00	$7.00-$15.00	X	X	X
Sea Horse Restaurant, 124 Rehoboth Ave, RB, 227-7451	150	7	11a-12A	YR			X		
Sir Boyce's Pub, Rte 1, RB, 227-8600	100	7	11a-10p	YR	$1.35-$3.95	$4.95-$8.95	X		X
Slicker's - Henlopen Hotel, Boardwalk & Lake Ave, RB, 227-2551	160	7	8a-10p	S	$1.25-$3.25	$5.95-$10.95	X	X	X
Starboard Restaurant & Lounge, Rte 1, DB, 227-8366	156	7	9a-1A	S			X		
T.J.'s Corner, Baltimore Ave, RB, 227-2316	90	7	8a-10p	S	$1.50	$8.00	X	X	
Seaford									
Bi Lo Restaurant, 606 Bridgeville Rd, 629-9943	80	7	4A-10p	YR	$1.70	$2.50-$5.50	X		
Canton Inn, Rte 20, 629-3021		7	12n-12A	YR			X	X	X
Dillard's Restaurant, Rte 13, 629-4814	200	7	6a-11p	YR	$1.65	$5.85			
Flagship Restaurant, Rte 13 & Nanticoke River, 629-9767	300	7	11a-10p	YR	$2.50-$5.95	$13.95			

IV. SUPPORT FACILITIES

E. SEASONAL HOUSING

DELAWARE SHORE AREA ONLY

COMMUNITY	NO. OF TRANSIENT RMS. REGISTERED	REGISTRATION FEE PER UNIT	TOTAL REVENUE 1977
BETHANY BEACH	1,578	$1.00/Room	$1,578
DEWEY BEACH	Not Available	Not Available	Not Available
FENWICK ISLAND	125	$25.00/Unit	$3,100
INDIAN RIVER INLET	Not Available	Not Available	Not Available
LEWES	Approx. 500	$1.00/Room; $5.00/House-Apt.	Approximately $500-1000
OCEAN VIEW	Not Available	Not Available	Not Available
REHOBOTH BEACH	1,713*	$10.00/Unit	$27,700
SOUTH BETHANY	Not Available	Not Available	Not Available

* Rehoboth Beach registration figures can be broken down as follows:

632	Apartment Units
305	Cottages or Houses
678	Rooms
98	Cabins (One Room)
1,713	TOTAL UNITS

V. MISCELLANEOUS COMMERCIAL

A. ANTIQUE DEALERS

NEW CASTLE COUNTY

1.	Antique Imports, Old Lancaster Pike, Hockessin	239-4926
2.	The Antique Shop, 1707 Chestnut, Wilmington	652-5216
3.	Antiques and Not So, 835 Tatnall, Wilmington	655-0504
4.	Becky's Antique Shop, du Pont Hwy, New Castle	328-9627
5.	Billie's Flea Barn, Inc., Rte 40, Newark	834-9890
6.	Bonnie's Antiques, 2000 Newport Gap Pike, Wilmington	994-4744
7.	Brandywine Antique and Gift Shop, 2116 N. Market, Wilmington	655-9826
8.	Brandywine Decor, 412 Delaware Ave., Wilmington	655-1644
9.	The Collector, 5716 Kennett Pike, Wilmington	654-0786
10.	Cooper's Antiques, 2015 Limestone Road, Wilmington	998-3520
11.	Corner Cupboard, 140 E. Cleveland Ave., Newark	731-9729
12.	The Corner Shoppe, 1200 Newport Gap Pike, Wilmington	998-7870
13.	Dean's Place, Rte 41, Hockessin	239-5959
14.	Margaret H. Doyle, 601 S. Maryland, Wilmington	994-1424
15.	Dragon Run Antiques, 213 Clinton, Delaware City	834-9015
16.	Eighteen Eighteen Antiques, 402 Delaware Ave., Wilmington	478-2681
17.	Eighteen Eighteen Antiques, 1818 Marsh Road, Wilmington	475-1815
18.	The Footsnapper, 1924 Gilpin Ave., Wilmington	656-3408
19.	The Gallery at Centerville, 5800 Kennett Pike, Centerville	656-4631
*20.	Eileen Gant Antiques, U.S. 13, north of Smyrna	653-6229
21.	The Glass Porch, 2201 Philadelphia Pike, Claymont	798-5261
22.	Greenwood Book Shop, 100 W. 9th Street, Wilmington	654-6237
23.	Michael Jackson and Willis Moore, 3rd and Delaware, New Castle	322-4365
24.	Jenny Lind's Treasure Chest, Elkton-Newark Road, Newark	368-9565
25.	Sally King Antiques and Gifts, 1701 N. Lincoln, Wilmington	654-2294
26.	Samuel S. Kirshner, 808 W. 22nd Street, Wilmington	655-4943
27.	Locust Run Antiques, 5 and Osborne, Odessa	378-9985
28.	Merrill's Antiques, 100 Northern Ave., Elsmere	994-1765
29.	Middle of Town Antique Shop, Broad and Main, Middletown	378-8064
30.	Milerski, 3801 Old Capitol Trail, Wilmington	994-6398
31.	Moonstone, 807 Shipley, Wilmington	658-7638
32.	Objets d'Arts, Independence Mall, Wilmington	655-2884
33.	Plemmons Gift Shop, 2320 Jefferson, Wilmington	654-8208
34.	Quality House, 124 Delaware Ave., New Castle	328-8000
35.	Walter Sebul, du Pont Hwy, New Castle	834-0500
36.	Second Hand Jacks, 2419 Concord Pike, Fairfax	478-6819
37.	Benjamin Sklut, 307 W. 2nd Street, Wilmington	658-1212
38.	David Stockwell Inc., 3701 Kennett Pike, Wilmington	655-4466
39.	Stuart Kingston Galleries, 264 Thomas Drive	652-7978
*40.	G.W. Thomas Antiques, U.S. 13, near Odessa	378-2414

KENT COUNTY

1.	A Bit of the Past, 1652 S. du Pont Hwy, Smyrna	653-9963
2.	A & M White House Antiques, U.S. 13, Smyrna	653-9446

* Member of the Delmarva Antique Dealers Association

KENT COUNTY (Continued)

3.	Black Kettle Antiques, near Garrisons Lake	674-1929
4.	Canterbury Used Furniture and Antiques, U.S. 13, Canterbury	284-9567
5.	Norman G. David, U.S. 13, Harrington	398-8229
6.	Dover Furniture Stripping, 505 S. Governors, Dover	674-0220
7.	Flamm Antiques, U.S. 13, Dover	734-5623
8.	Furniture Exit, 259 E. Camden-Wyoming Ave., Camden	697-7391
9.	Graham's New and Used Furniture, 228 W. Division, Dover	736-1370
10.	Harper Antiques, Rte 14, West Milford	422-9783
*11.	Meeting House Square Antiques, 305 S. Governors, Dover	678-1853
12.	Now & Then Furniture, S.E. Railroad Ave., Wyoming	697-3318
13.	Old Dover Antiques, 666 S. du Pont Hwy, Dover	736-1345
14.	Old Sleigh Antiques, 2151 S. du Pont Hwy, Dover	697-6380
15.	Elaine Owen, U.S. 13, Dover	734-8304
16.	Peacock Plume, Inc., N. du Pont Hwy, Smyrna	653-8635
17.	Picture Frames Antiques, RD 1, Smyrna	653-4526
*18.	Roberts Antique Lamps, U.S. 13, Dover	697-3414
19.	The Stable Shoppes, 800 N. State Street, Dover	736-2933
20.	Station House Antiques, 315 N. Layton, Wyoming	697-2933

SUSSEX COUNTY

*1.	Antique City, Ocean View	539-7521
*2.	Blue Hen Farm Antiques, Road 541, Seaford	629-7718
*3.	Brick Barn Antiques, Rtes 18 and 9, Georgetown	684-8220
4.	Candlelight Antiques, Rte 113, Georgetown	856-7880
*5.	Culver's Antiques, Rte 9, Laurel	875-7673
6.	Dinner Bell Inn, 2 Christian, Rehoboth Beach	227-2561
7.	Early Attic Antique Shop, Rte 116, West Greenwood	349-5150
*8.	Five Points Antiques Shop, Alternate Rte 13, Laurel	875-5254
*9.	The Golden Door, 214 E. Market, Laurel	875-5084
*10.	Hudson House Antiques, Rte 1 and Benson, Rehoboth Beach	227-2487
*11.	Hudson House Antiques, Rte 1 at Airport Road, Rehoboth Beach	227-2487
*12.	Iron Age Antiques, Central Ave., Ocean View	539-5344
*13.	Jackson's Antiques, Fifth at Spruce, Laurel	875-7823
*14.	McCallister's Antique Shop, U.S. 13, Seaford	629-6996
*15.	Ruth Mervine, Rte 36, Greenwood	349-4282
*16.	Royal Antiques, U.S. 13, Greenwood	349-4694
*17.	Edwin L. and Oleta Smith Antiques and Gadgets, 422 Race Street, Georgetown	856-6004
18.	Tull's Carriage House, Market and Railroad, Bridgeville	337-7879
*19.	Val's Antiques, 306 Fourth Street, Laurel	875-2947
*20.	Wells Antiques, 900 Concord, Seaford	629-6977
*21.	York's Homestead Shoppe Antiques, Rte 9 (Del. 18), Milton	684-3262

* Member of the Delmarva Antique Dealers Association

V. MISCELLANEOUS COMMERCIAL

B. FACTORY OUTLETS

DELAWARE OUTLET STORES

1. Brand Name Fashion Outlet
   Rte 13, midway between Dover and Smyrna (302) 653-5037
   First quality men's and women's wear, some gift items. Some seconds.

2. Byler's Store
   Five miles from Dover off Rte 8 on Rte 159 (302) 674-1689
   Dented canned goods and other packaged foodstuffs. Bulk bakery items such as flour. Health foods, dried fruits and nuts.

3. Decker's
   Rte 13, Delmar (302) 846-3889
   Gant shirt outlet. First, seconds, some outdated. Some women's clothing.

4. Delaware Mattress
   1114 MacArthur Drive, Greater Wilmington Airport (302) 328-1415
   Both regular sizes and custom mades. Regular construction and foam. Selection of ticking. Factory prices. Delivery arranged.

5. The Blue-Eyed Devil
   Rte 7, Stanton (302) 994-5711
   Fabric, patterns, trims, zippers and buttons.

6. Draper-King Cole
   Chestnut Street, Milton (302) 684-8555
   Canned vegetables and some frozen vegetables and meats. Most items available year-round.

7. Factory Outlet
   613 Market Street, Wilmington (302) 654-1080
   Girls dresses, over 3,000 in stock. Most sizes, including chubbies. Some women's wear. About half price on most items.

8. Golden Eagle
   114 Loockerman Street, Dover (302) 678-1888
   An outlet for items made by senior citizens. All hand-crafted. Many one-of-a-kind.

9. Kling's Meat Market
   Rte 10 near Petersburg (302) 284-4864
   Cattle are grain fed, slaughtered and butchered. Beef, pork, home-smoked products. Low prices for well-trimmed meats.

10. Maternity Wear-House
    Eighth Street, Downtown Wilmington (302) 658-0433
    Midway Shopping Center, Wilmington (302) 994-9975
    Maternity wear for every occasion. Top quality goods at discount prices. Special buys, factory direct items.

11. Milford Stitching
South Marshall Street, Milford (302) 422-8021
Bedspreads of all types, comforters and other bedding items. Towels, tablecloths, rugs, draperies. Open first and third Saturday each month.

12. The Mill Outlet
58 Rehoboth Avenue, Rehoboth Beach (302) 227-8340
Linens, towels, bedspreads and comforters.

13. Murray's Wholesalers Clothing Outlet
4315 Governor Printz Blvd. and 101 Greenbank Road, both in Wilmington (302) 764-5100
Large selection of men's clothing. All sizes, styles, for small, medium and large men.

14. The Pottery
U.S. 13, just south of Smyrna (302) 653-7974
Factory outlet for china, glassware, ironstone. Both place setting and full sets of dinnerware available.

15. Three-B's
233 Railroad Ave., Wyoming (302) 697-7222
Huge selection of jeans for all ages, men and women, boys and girls. Western clothes and many unusual items.

16. Wilmington Dry Goods
Bay Court Plaza, Dover (302) 678-3550
Tri-State Mall, Claymont (302) 798-9506
Major discounts on a wide variety of goods, including designer clothing, housewares, linens and hardware.

17. Woodside Surplus
U.S. 13, just south of Woodside (302) 284-4134
Lumber and other building materials at discount prices.

NEARBY MARYLAND OUTLET STORES

1. Carver Hall
Rte 413, outside Crisfield, Maryland (301) 968-1212
World famous cutlery up to 50% off. Glassware, pewter, sterling silver, brass and woodenware also sold.

2. Clothes Horse
817 Waverly Shopping Center, Salisbury, Maryland (301) 749-7406
Men's and women's wear.

3. Factory Fabric Outlet
233 East Main Street, Salisbury, Maryland (301) 742-4199
Dress materials, drapery and upholstery fabrics, foam rubber.

4. Sewing Outlet
112 N. Main Street, Federalsburg, Maryland (301) 754-8961
Upholstery and drapery fabrics. Thousands of bolts at factory-direct prices.

V. MISCELLANEOUS COMMERCIAL

C. SHOPPING MALLS

NEW CASTLE COUNTY AND WILMINGTON

1. Christiana Mall
   Location: Rtes I-95 and 7, Christiana
   Anchor Stores: Bamberger's, Strawbridge and Clothier

2. Concord Mall
   Location: Concord Pike (Rte 202), Wilmington
   Main Telephone: (302) 478-5467
   Anchor Store: Pomeroy's

3. Market Street Mall
   Location: Market Street, Downtown Wilmington
   Main Attractions: Small shops and restaurants, Willingtown Square, Old Town Hall, Grand Opera House

4. Newark Shopping Center and Main Street
   Location: Newark
   Anchor Stores: Montgomery Ward, Newark Department Store, Woolworth's

5. Prices Corner Shopping Center
   Location: Kirkwood Highway, Wilmington
   Anchor Stores: J.C. Penney, Sears

6. Tri-State Mall
   Location: Claymont
   Main Telephone: (302) 798-6834
   Anchor Store: Wilmington Dry Goods

7. Wilmington Merchandise Mart
   Location: Governor Printz Boulevard, Wilmington
   Main Telephone: (302) 764-6231
   Anchor Stores: J.C. Penney, Strawbridge and Clothier

KENT COUNTY

1. Bay Court Plaza
   Location: Bay Road (Rte 113), Dover
   Anchor Stores: Dover Warehouse, Towers, Wilmington Dry Goods

2. Blue Hen Mall
   Location: Bay Road (Rte 113), Dover
   Anchor Stores: J.C. Penney, Woolco

3. Milford Shopping Center
   Location: Rte 113, Milford
   Anchor Stores: Ames, Leggett's

SUSSEX COUNTY

1. Boardwalk and Rehoboth Avenue Area
   Location: Rehoboth Beach
   Main Attractions: Clusters of small shops and restaurants

2. Midway Shopping Center
   Location: Lewes-Rehoboth Highway (Rte 1), Rehoboth Beach
   Main Attractions: Cluster of small shops and restaurants

VI. ARTS, CULTURAL AND CIVIC GROUPS

DANCE

1. Arden Folk Guild
   Square and folk dancing every Wed. night, 8:30p. No experience or partners needed.
   475-7094

2. Delaware Regional Ballet Co.
   Marion Tracy, Director
   P.O. Box 160
   1071 S. Governors Ave.
   Dover, Delaware 19901
   674-1020

3. Group '77 - Combination School
   Dance and drama group based on Isadora Duncan methods. Welcomes 12 yr olds thru adults.
   Kay Murray 999-1438

4. New Space Company
   Mitchell Hall
   University of Delaware
   Newark, Delaware 19711
   Debra Loewen 738-2202

5. Modern Dance Guild of Arden
   Gild Hall, Arden
   Linda Stanton 999-0067

6. 2 X 4 Square Dance Club
   Club level square dancing. First and third Fri., 8:30-11:30p. W.E. Shue School, Kirkwood Hwy, Newark.
   D.L. Gerwig 239-4046

DRAMA

1. Academy of Theatre Arts
   J. Preston Powell, Director
   313 N. Broom Street
   Wilmington, Delaware 19808

2. Alumni Theatre Association
   Tom Marshall
   10 Capano Drive
   Newark, Delaware 19702
   478-2691

3. Arden Players Guild
   Irene Pratt, President
   10 Glenrock Drive
   Claymont, Delaware 19703

4. Ardensingers (Gilbert & Sullivan)
   Rae Gerstine
   2111 Orleans Road, Arden
   Wilmington, Delaware 19810

5. Arena Stages
   Robert C. Grass
   10 Lindsey Place
   Wilmington, Delaware 19809

6. Brandywiners, Inc.
   Rev. Taylor
   4900 Concord Pike
   Wilmington, Delaware 19803
   478-2123

7. Chapel Street Players
   27 N. Chapel Street
   Newark, Delaware 19711
   Mrs. C.H. Simmons 731-5530

8. Children's Repertory Theatre
   Marie Swajeski
   1302 Newcomb Road
   Wilmington, Delaware 19803
   478-6712

9. Community Singers, Inc.
   P.O. Box 47
   Dover, Delaware 19901
   Trudy Ruehrmund, President

10. Delaware State College Theatre
    Dover, Delaware 19901
    678-4628

11. Delaware Theatre Association
    Mrs. Ernest Solway, President
    Garden Club Apartments, 9-B
    200 Brandywine Blvd.
    Wilmington, Delaware 19803
    478-5870

Source: Delaware Arts Council

DRAMA (Continued)

12. Dickinson Theatre Organ Society
Bob Dilworth 995-2603

13. Foundation Internationale de Delaware
P.O. Box 3575
Greenville, Delaware 19807
Dr. H.E. Bergna, Pres. 655-2341
Mrs. S.M. Angell, 762-1939

14. Kent County Theatre Guild
Ted Bessler, Chairman
P.O. Box 783
Dover, Delaware 19901
674-3000

15. Lyceum Players
Mrs. Robert Bruce
2103 E. Prior Road
Wilmington, Delaware 19809
798-0577

16. Minikin Opera Company
June Cason
1125 Grinnell Road
Wilmington, Delaware 19803
478-6613

17. Possum Point Players
c/o Louise Hartzell
406 Elizabeth Street
Georgetown, Delaware 19947

18. The Singing Players
Margaret Storey
333 Pennsylvania Avenue
Dover, Delaware 19901
734-2094

19. Steppingstone
Mitchell Hall
University of Delaware
Newark, Delaware 19711
Peter Engle 738-8034

20. Theatre Arts Committee, Unitarian Players
First Unitarian Soc. of Wilm.
Raymond Bock, Project Director
Halstead Road
Wilmington, Delaware 19803
478-2384

21. Theatre Resource Center
Mitchell Hall
University of Delaware
Newark, Delaware 19711
Costumes: Dan Wilhelm
Technical: P. Vagenas, T. Watson
738-2202

22. University of Delaware
Newark, Delaware 19711
Theatre: 738-2202
Music: 738-2577
Art: 738-2244
Cultural Affairs: 738-1171

23. University of Delaware Children's Theatre
Mitchell Hall
University of Delaware
Newark, Delaware 19711
Brian Hansen 738-2202

24. Wilmington Drama League
H. Michael Walls, Exec. Dir.
P.O. Box 504
Wilmington, Delaware 19899
764-1172

25. Wilmington Opera Society, Jr. Division
P.O. Box 4671
Newark, Delaware 19711
Rev. Taylor, Pres. 478-2123

26. YMCA Encore Players
YMCA
1137 S. State Street
Dover, Delaware 19901
674-3000

ETHNIC

1. Christian Business Men's Comm.
Mr. DeLaCruz 999-2585

2. Jewish Community Center Orchestra
R. Dodelin, Conductor
101 Garden of Eden Road
Wilmington, Delaware 19803
478-5660

3. Latin American Community Center
1202 West 4th Street
Wilmington, Delaware 19805
658-9884

ETHNIC (Continued)

4. Scottish American Association of Delaware
Wilmington, Delaware 19810
Mrs. Helen Speir 994-8404

GENERAL

1. Amelgo Singles
Les Walls 652-6926
Ann Lins 654-3548
Arlene Katash 654-9434

2. American Association of Retired Persons, Wilm. Chapter #1972
Mr. Amsco Bruinier 658-2300

3. Brandywine Bonsal Society
For those interested in the Japanese art of growing trees.
Mrs. J.F. Froning
Box 3541
Greenville, Delaware 19807

4. Brandywine Social Club
For minimally handicapped ambulatory adults, ages 17-27.
Jerome Siskind, Linda Schoenberg
478-9411

5. Coalition for Nuclear Power Plant Postponement
Organized to educate citizens of Del. about nuclear power plants.
Jeanette Pinder 658-3875

6. Common Cause of Delaware
A local non-partisan citizens' lobby working to make national and state government more open, accountable and responsive.
908 King Street, 656-8966
Call Office (M-F, 9a-12n)

7. Community Awareness Group
Organized for unmarried young to middle age adults to meet and hear guest speakers.
11th and Markets Streets
Wilmington, Delaware 19899
654-5371

8. Delaware African Violet Society
Mrs. E. Abramson 478-2536

9. Delaware Astronomical Society
Alfred C. Webber (215) 793-1129

10. Delaware Valley Region of IMSA
Mindy Warner 478-0222 (after 5p)

11. DELCIV
Delaware Council for International Visitors developed in Delaware to serve international visitors.
910 Gilpin Avenue, Wilmington
Mrs. Alfred A. Gruber
B-655-3341 H-738-9674

12. Delaware Beekeepers Association
Vance Mitchell
190 Christiana Road
New Castle, Delaware 19720
326-3920

13. Delaware Blues: Fort Delaware
Fort Delaware State Park
P.O. Box 170
Delaware City, Delaware 19706
Ramon Armstrong 834-7987

14. Delaware Camera Club
Lovering Avenue
Wilmington, Delaware
W.T. Drennen, Jr. 656-4722
Betty B. Fretz 239-7353

15. Delaware Indoor Light Gardening Society
Lombardy Elem. School, Foulk Road
Mrs. Sandra T. Keen 475-5048

16. Delaware Mineralogical Society
Concord Presbyt. Church, Fairfax
Joe Davis 478-6851

17. Delaware Orchid Society
Aldersgate Method. Church Aud.
Mysty McPherson 239-7989

18. Dept. of Del. Reserve Officers Association
Richard S. Crews 762-1883

GENERAL (Continued)

19. Delaware Dept. of Public Instruction
Townsend Building
Dover, Delaware 19901
678-4885 Document 20

20. Del. Tech. and Comm. College
Southern Campus
Georgetown, Delaware 19947
856-5386

21. INFO
Wilcastle Center
2600 Pennsylvania Avenue
Wilmington, Delaware 19806
571-8100

22. Diamond State Association for Children with Learning Disabilities
P.O. Box 177
Claymont, Delaware 19703
Mrs. Ronald Windsor 475-6416

23. The Environmental Committee of Correspondence
Bulletin on environmental and wetland concerns.
P.O. Box 7313
Wilmington, Delaware 19803

24. League of Women Voters of Greater Wilmington
Alfreda Clinton 996-8395

25. Project Club
Movement to improve communication, understanding and brotherhood between blacks and whites.
YMCA, Central Branch
Mrs. Sally Monigle 571-6903

25. Recreation, Promotion & Service, Inc.
1307 Orange Street
Wilmington, Delaware 19801
656-8364

LITERATURE

1. Delaware Association of Teachers of English Language Arts
James Brasure, Treasurer
3 Sheldrake Road
Wilmington, Delaware 19810

2. En Passant Literary Association
James Costello, Editor
1906 Brant Road
Wilmington, Delaware 19810
B-774-4571 H-475-2435

3. First State Writers
E. Jean Lanyon, President
4 E. Cleveland Avenue
Newark, Delaware 19711
368-7495

4. National League of American Penwomen (See Visual Arts)

5. Wilmington Poetry Society and Delaware Writers, Inc.
David Hudson
417 W. 21st Street
Wilmington, Delaware 19802
658-1117

MUSEUMS AND HISTORICAL SOCIETIES

1. Anna B. Hazzard Museum
Rehoboth Beach Hist. Society
Col. Reed A. Booth, President
114 Norfolk
Rehoboth Beach, Delaware 19971

2. Barratt's Chapel Museum
Frederica, Delaware 19945
Commission on Archives and Hist. and Hist. Soc. of the Peninsula
Annual Conference
The United Methodist Church
139 N. State Street
Dover, Delaware 19901

3. Bethel Historical Society
Mr. H. Kennedy Graves, President
Bethel, Delaware 19931

4. Bowers Beach Maritime Museum
Bowers Beach, Delaware 19946
Mrs. Jane Boone
RD 1, Bowers Beach 19946
Mrs. Helen Achtenberg
Cooper's Cove, Frederica 19946

5. Brandywine River Museum
James H. Duff (215) 388-7601

MUSEUMS AND HISTORICAL SOCIETIES (Cont'd)

6. Bridgeville Historical Society
Mr. Thurman Adams, President
The Sudler House
Bridgeville, Delaware 19933

7. T. Clarence Marshall Museum
Magic Age of Steam
P.O. Box 127
Yorklyn, Delaware 19736

8. Delaware Agricultural Museum
Mr. Edward F. Evans
Cheswold, Dover, Delaware 19901

9. Delaware Art Museum
2301 Kentmere Parkway
Wilmington, Delaware 19806

10. Delaware Museum of Natural History
Mr. John E. du Pont, Director
Kennett Pike, Rte 52, Box 3937
Greenville, Delaware 19807

11. Delaware Nature Education Society
Mr. Howard P. Brokaw, President
Mr. Norman G. Wilder, Exec. Dir.
Box 700
Hockessin, Delaware 19707

12. Delmar Bicentennial Committee
Mrs. Irene Culver, President
211 Spruce Street
Delmar, Delaware 19940

13. Division of Hist. and Cult. Affairs
Dr. Lawrence C. Henry, Director
Hall of Records
Dover, Delaware 19901

14. Duck Creek Historical Society
The Lindens
Mr. George L. Caley, President
c/o Div. of Hist. and Cult. Affairs
Hall of Records
Dover, Delaware 19901

15. Fort Delaware Museum
Delaware Div. of Parks and Rec.
Mr. Gordon Patterson, Curator
4503 Washington Street, Ext.
Wilmington, Delaware 19803

16. Hagley Museum
Dr. Walter J. Heacock, Director
Greenville, Delaware 19807

17. Henry Francis du Pont Winterthur Museum
Dr. James Morton Smith, Director
Winterthur, Delaware 19735

18. Historical Society of Delaware
Mr. Dale Fields, Director
505 Market Street
Wilmington, Delaware 19801

19. Iron Hill Museum of Nat. Hist.
Mr. Bob Nelson, Curator
Old Baltimore Pike
Newark, Delaware 19711

20. Laurel Historical Society
Mrs. Madeline Dunn, President
408 E. 4th Street
Laurel, Delaware 19956

21. Lewes Historical Society
Dr. James E. Marvil, President
324 W. 3rd Street
Lewes, Delaware 19958

22. Lincoln Collection
Mrs. E. Marston Fox, Curator
University of Delaware
Goodstay Center
2600 Pennsylvania Avenue
Wilmington, Delaware 19806

23. Lombardy Hall Foundation
Mr. Harold K. Littleton, Pres.
P.O. Box 7036
Wilmington, Delaware 19807

24. Milford Historical Society
Mrs. Thomas E. Dyer, President
Parson Thorne Mansion
501 N.W. Front Street
P.O. Box 352
Milford, Delaware 19963

25. Milton Historical Society
Mrs. W. Layton Reed
President and Curator
Lydia Ann B. Cannon Museum
718 Chestnut Street
Milton, Delaware 19968

MUSEUMS AND HISTORICAL SOCIETIES (Cont'd)

26. National Railway Historical Society
Wilmington Chapter
Henry Dickinson
P.O. Box 2386
Wilmington, Delaware
475-3454

27. Nemours Foundation
Mr. Roy Boatman, Director of Tours
P.O. Box 109
Wilmington, Delaware 19899

28. New Castle Historical Society
Mr. Robert S. Appleby, President
2 E. 4th Street
New Castle, Delaware 19720

29. Old Christ Church League
Mr. George Calhoun, President
1319 Concord Road
Seaford, Delaware 19973

30. Port Penn Museum
Mrs. Margaret Zaacheis, Manager
Market and Liberty Streets
Port Penn, Delaware 19731

31. Rehoboth Art League, Inc.
Mrs. Howard McGee, President
Henlopen Acres
Rehoboth Beach, Delaware 19971

32. Rockwood Museum
New Castle County Parks and Rec.
Mildred Kaliski, Facility Manager
610 Shipley Road
Wilmington, Delaware 19803

33. The Society of Natural History of Delaware
Dr. A. Matlack 239-5383

MUSIC

1. American Youth Jazz Band of Delaware, Inc.
Hal Schiff, President
c/o Murdock & Walsh
P.O. Box 949
300 Delaware Ave.
Wilmington, Delaware 19899
B-476-5000 H-478-0987

2. Arden Chamber Players
c/o Wilmington Music School
4101 Washington Street
Wilmington, Delaware 19802
Maggie Teal 475-3772

3. Arden Consort
Mrs. Milton I. Gerstine
1602 Appletree Lane
Wilmington, Delaware 19810
475-7236

4. Artistic Productions
Jean Collat
1300 Greenway Road
Wilmington, Delaware 19803
478-7112

5. Brandywine Pops Orchestra
Mrs. Dorothy S. Graham, President
714 Cheltenham Road
Wilmington, Delaware 19808
994-8304

6. Brandywine Valley Friends of Old Time Music
P.O. Box 3504
Greenville, Delaware 19807
Ellen Hudak 737-3333

7. Breck's Mill Band
Herb Leverage 998-5052

8. Christina Electric Light Orch.
Sean Wayne Koonce
Christina Cultural Arts Center
800 E. 7th Street
Wilmington, Delaware 19801

8. Collegium Antiquum
Katherine Boardman
4 Clyth Drive
Wilmington, Delaware 19803
478-3524

10. Delaware Choral Society
Rose Marie Van Thorpe, Pres.
653-7004
Joan M. Norton, Treasurer
5 Huntly Circle
Dover, Delaware 19901
B-678-5314 H-734-5644

MUSIC (Continued)

11. Delaware Musica Viva
P.O. Box 4671
Newark, Delaware 19711

12. Delaware Musical Society
Local 311-641 of AFM
6 West 30th Street
Wilmington, Delaware 19802
762-4993

13. Delaware Musical Educators Assn.
Wesley E. Diemer, President
2601 Cayuga Road
Wilmington, Delaware 19810

14. Delaware Pro Musica
P.O. Box 5053
Wilmington, Delaware 19808

15. Delaware State Music Teachers Association
Jeanne Pascal, President
1611 Shadybrook Road
Wilmington, Delaware 19803
764-9762

16. Delaware String Quartet
Leo Ahramjian, Director
2122 Valley Road
Wilmington, Delaware 19810
B-772-3545 H-475-6437

17. Delaware Symphony Orchestra
P.O. Box 1870
Wilmington, Delaware 19899
656-7374

18. Delaware Trio
Louisa Marks
13 Alwyn Road
Newark, Delaware 19713
368-4357

19. Delos Quartet
c/o Cultural Affairs
University of Delaware
Newark, Delaware 19711
738-1171

20. Dover Baroque Ensemble
Edith Mroz
RD 2, Box 668
Dover, Delaware 19901
674-2961

21. Dover Music Teachers Association
Mrs. Audrey Sherrill
20 S. Fairfield Drive
Dover, Delaware 19901

22. Dover Symphony Orchestra
Mrs. Keith Hamilton, President
35 N. Fairfield Drive
Dover, Delaware 19901
697-1881

23. DuPont Chorus
Richard Weimar
Chestnut Run, Building 701
Wilmington, Delaware 19805

24. First State Symphonic Bank
Kenneth Scherer, President
6 East Rosemont Circle
Newark, Delaware 19711
B-366-3408 H-(301) 398-5542

25. The Interpreters
George Steele
120 Banbury Drive
Wilmington, Delaware 19803

26. Lewes-Rehoboth Choral Society
Mrs. Harold Wallin, President
12 Rhode Island Avenue
Lewes, Delaware 19958
645-9474

27. Mid-Atlantic Modern Music Inst.
c/o Quaudio Studios
5201 Governor Printz Boulevard
Wilmington, Delaware 19809
762-6121

28. Minikin Opera Company
(See Drama)

29. Mt. Pleasant Community Band
c/o Alfred Belak
508 Crest Road
Wilmington, Delaware 19803
B-762-5000 H-764-8772

30. New Ark Choral Society
Michael Larkin
16 Greenbridge Drive
Newark, Delaware 19711
737-0173

MUSIC (Continued)

31. Newark Symphony Orchestra
Harley Hastings, Conductor
P.O. Box 1012
Newark, Delaware 19711
731-2223, 368-4680

32. New Castle Choral Society
P.O. Box 62
New Castle, Delaware 19720
Charles Hufnal, Treas. 998-3299

33. Northern Delaware Oratorio Society
Jean Mosteller
2603 Pike Creek Road
Wilmington, Delaware 19808
737-1082

34. Rehoboth Art League Music Program
Fritz Hessemer, Director
Henlopen Acres
Rehoboth Beach, Delaware 19971

35. Serenata Wind Soloists
Charles Holdeman, Director
1304 N. Clayton Street
Wilmington, Delaware 19806
654-9597

36. Spebsqsa Wilmington Chapter
Jack Carney 655-8735

37. Sweet Adelines, Inc.
Blue Hen Chapter
Ginny Bohanan 792-1409

38. University of Delaware Alumni Choir
Peter McCarthy
15 Lovett Avenue
Newark, Delaware 19711
368-5007

39. Wilmington Chamber Orchestra
Stephen Gunzenhauser
Wilmington Music School
4101 Washington Street
Wilmington, Delaware 19802
762-1132

40. Wilmington Concert Association
Dorothea McLane 762-0753

41. Wilmington Madrigal Singers, Inc.
Karl Blumenberg
1204 Windon Drive
Wilmington, Delaware
478-3967

42. Wilmington Opera Society
P.O. Box 3553
Greenville, Delaware 19807
656-7374

SPORTS

1. Amateur Softball Association
Gerald L. Corrigan 571-7728

2. Brandywiners
Bill Peuchen 656-2443

3. Brandywine Motor Sports Club
Suzanne Bush 654-5351

4. Brandywine Polo Matches
Richard Jones 658-5102

5. Delaware Tennis Association
Mrs. John (Ellen) Foote 475-3775

6. Delaware & Chesapeake Sailing Association, Inc.
Bill Sanford 368-5779

7. Delaware Sports Club
Al Chirnside 774-6344

8. Delaware Sportsfishing Tournament
Del. Div. of Fish & Wildlife
Fred Bonner 678-4431

9. Delaware State Pistol Club
Hugh W. Gray 654-0249

10. Delaware State Sportsmen's Assn.
George Bolton 762-1990

11. Delaware Underwater Swim Club
Joe DiFebo, divemaster 994-7485

12. First State School of Gymnastics
Marjorie Gilbert 328-8442 (2-9p)

13. Joggers Cross Country Meets
Thomas H. Fort 774-6922

SPORTS (Continued)

14. First State Treasure Hunters Club
Harry Bodofsky 475-9411

15. French Alliance of Wilmington
Mr. Ansco G. Bruinier 737-2694

16. Hindu and Yoga Center
Bharat Gajjar 762-5638

17. Newark YMCA Table Tennis Club
Dick Organist 368-5361

18. Skating Club of Wilmington, Inc.
R. Woodland 656-5005

19. Upper Chesapeake Ski Club
C.N. Wenner 475-7034, 999-4529

20. Wilmington Coin Club
Mr. John Goyne 998-6500

21. Wilmington School of Karate
A.E. Foote 998-0985

22. Wilmington Shell Club
Mrs. Frank Piech 994-2273 (after 4p)

23. Wilmington Ski Club
Jo Miller 738-0496

24. Wilmington Stamp Club
John Sivert 764-5377

25. Wilmington Storytellers
Pat Cundiff (215) 255-4204

26. Wilmington Swim Club
Bob Mattson 655-5501

27. Wilmington Swim School
2150 New Castle Ave
New Castle, Delaware 19720
Bob Mattson 655-5501

28. Wilmington Touchdown Club
Wm. Gerow 774-5094

29. Wilmington Trail Club
Barbara Szanto 798-1340

30. YMCA
Van Nichols 571-6900

VISUAL ARTS

1. ARTreach
Tom Sherman, Director
Delaware Art Museum
2301 Kentmere Parkway
Wilmington, Delaware 19806
571-9590

2. Brandywine River Museum Education Roundtable
Greenville, Delaware 19807
Marion Johnson 571-9594

3. Christina Cultural Arts Center
800 E. 7th Street
Wilmington, Delaware 19801
652-0101

4. Council of Delaware Artists
Vernon Good, President
819 West Street
Wilmington, Delaware 19899
655-8935

5. Delaware Arts Society
Richard Layton
2600 W. 19th Street
Wilmington, Delaware 19806

6. Delaware Camera Club
Mrs. A.W. Fretz, President
210 North Star Road
Newark, Delaware 19711
239-7353

7. Delaware Crafts Council
Gina Bosworth, President
3301 Coachman Road
Wilmington, Delaware 19803
478-5672

8. Delaware State Arts Council
Mrs. Sophie Consagra 571-3540

9. Dover Art League
Ida Doucette, President
Box 969
Dover, Delaware 19901
653-6639

10. Embroiderers' Guild of America, Inc.
Bunny Ebeling 478-4047

VISUAL ARTS (Continued)

11. Handweavers Guild of America
Hallie Thayer, National Rep.
RD 3
Newark, Delaware 19711
239-4649

12. Harmony Weavers Guild
Mrs. (Robert) Jo Akell
1506 Fresno Road
Wilmington, Delaware 19803
478-6660

13. Kent County Arts Council
422 South Governors Avenue
Dover, Delaware 19901
734-3330

14. Lewes Historical Society
Lewes, Delaware 19958
645-9590

15. National League of American Penwomen
New Castle County Branch
Shirley Patterson, President
3405 S. Rockfield Drive
Wilmington, Delaware 19810
478-4460

16. New Castle County Dept. of Parks and Recreation
The Arts Studios
310 Kiamensi Road
Wilmington, Delaware 19804
571-7730

17. Northern Delaware Arts League
4 Dennis Drive
Wilmington, Delaware 19808
995-1753

18. Rehoboth Art League
P.O. Box 84
Henlopen Acres
Rehoboth Beach, Delaware 19971
227-8408

19. The Studio Group
1305 N. Franklin Street
Wilmington, Delaware 19806
656-7304

20. Sussex County Arts Council
P.O. Box 221
Georgetown, Delaware 19947
856-5421

21. Today's Artists
Betty Carr
130 Holland Drive
Wilmington, Delaware 19803

22. Wesley College
John Mingus, Arts Admin.
Dover, Delaware 19901
674-4000, ext. 366

23. Wilmington Arts Commission
Cynthia Burt, Director 571-4285

24. Women's Correctional Institute Arts Workshop
2 West 5th Street
Wilmington, Delaware 19801
652-5098

25. Woodbridge Art League
Francis Lewis
Sussex Avenue
Bridgeville, Delaware 19933
337-7060

VII. SOURCES OF INFORMATION

DELAWARE STATE TOURISM STUDY - RESOURCE INVENTORY

ATTRACTIONS

American Automobile Association Tour Book, Mid-Atlantic, 1978 Edition.
Bethany Beach-Fenwick Island Chamber of Commerce, "The Quiet Resorts", 1979 Edition.
Brandywine Conservancy, "Discover Brandywine Valley", 1978 Edition.
Brandywine River Museum, Letter from John Sheppard, August 10, 1978.
Central Delaware Visitors & Convention Bureau, "Discover Dover and Kent County in Central Delaware, U.S.A."
Delaware Department of Community Affairs and Economic Development, Division of Economic Development, Delaware State Travel Service, various brochures and reports.
Delaware Department of State, Division of Historical and Cultural Affairs, various brochures and reports.
Detchon, Elliot R. and Helen A., The Go ... Don't Go Guide to Delaware and Nearby Pennsylvania, 1976.
Historical Society of Delaware, various brochures.
Mobil Travel Guide, Middle Atlantic States, 1978.
Rehoboth Beach Chamber of Commerce, "Delaware Coast Vacationland", 1979, and "Rehoboth Beach Map & Visitors Guide", 1978.
Telephone Survey

EVENTS

American Automobile Association Tour Book, Mid-Atlantic, 1978 Edition.
Central Delaware Visitors & Convention Bureau, "Discover Dover and Kent County in Central Delaware, U.S.A."
Delaware Department of Community Affairs and Economic Development, Division of Economic Development, Delaware State Travel Service, "Annual Events in Delaware", "Delaware Calendar of Events '77" and "1979 Calendar of Events".
Detchon, Elliot R. and Helen A., The Go ... Don't Go Guide to Delaware and Nearby Pennsylvania, 1976.
Mobil Travel Guide, Middle Atlantic States, 1978.
Recreation, Promotion & Service, Inc., "Calendar of Events", 1978.

OUTDOOR RECREATION

Delaware Department of Natural Resources and Environmental Control, Division of Parks and Recreation, Technical and Community Recreation Services Section, Delaware's Statewide Comprehensive Outdoor Recreation Plan, 1979.
University of Delaware, College of Marine Studies, Sea Grant Marine Advisory Service, "A Guide to Delaware's Coastline Marinas".

SUPPORT FACILITIES

Campgrounds

Delaware Campground Association, "Campgrounds".
Delaware Department of Community Affairs and Economic Development, Division of Economic Development, Delaware State Travel Service.

Delaware Department of Natural Resources and Environmental Control, "Delaware Outdoors" and other brochures.
Rand McNally Campground & Trailer Park Guide, 1978.
Telephone Survey
Three Seasons Camping Resort, "3 Seasons Camping Resort".

Hotels and Motels

American Automobile Association Tour Book, Mid-Atlantic, 1978 Edition.
Bethany Beach-Fenwick Island Chamber of Commerce, "The Quiet Resorts", 1979 Edition.
Delaware Department of Community Affairs and Economic Development, Division of Economic Development, Delaware State Travel Service, "Hotel and Motel Guide", 1978.
Diamond State Telephone Company, Dover-Milford, Georgetown, Seaford-Laurel and Wilmington, 1978 and 1979 Editions.
George Washington Country, 1978-79 Sales Guide.
Lewes Chamber of Commerce, "Lewes Chamber of Commerce, 1978".
Rehoboth Beach Chamber of Commerce, "Delaware Coast Vacationland", 1979, and "Rehoboth Beach Map & Visitors Guide", 1978.
Telephone Survey
University of Delaware, College of Marine Studies, Sea Grant Marine Advisory Service, "A Guide to Delaware's Coastline Hotels & Motels", 1976.

Restaurants

Bethany Beach-Fenwick Island Chamber of Commerce, "The Quiet Resorts", 1979 Edition.
Detchon, Elliott R. and Helen A., The Go ... Don't Go Guide to Delaware & Nearby Pennsylvania, 1976.
Diamond State Telephone Company, Dover-Milford, Georgetown, Seaford-Laurel and Wilmington, 1978 and 1979 Editions.
Galprint Publications, "Wilmington Dining & Dancing Directory", Vol. I, No. 1, 1978.
Lewes Chamber of Commerce, "Lewes Chamber of Commerce, 1978".
Mobil Travel Guide, Middle Atlantic States, 1978.
Rehoboth Beach Chamber of Commerce, "Delaware Coast Vacationland", 1979, and "Rehoboth Beach Map & Visitors Guide", 1978.
Telephone Survey
University of Delaware, College of Marine Studies, Sea Grant Marine Advisory Service, "A Guide to Delaware's Coastline Restaurants", 1975.

Seasonal Housing

Bethany Beach Municipal Government, Mrs. Warrington, (302) 539-8011.
Fenwick Island Municipal Government, Ms. Toomey, (302) 539-3011.
Lewes Municipal Government, Mr. Ron Donovan, (302) 645-7777.
Rehoboth Beach Municipal Government.
South Bethany Beach Municipal Government.

MISCELLANEOUS COMMERCIAL

Delaware Department of Community Affairs and Economic Development, Division of Economic Development, Delaware State Travel Service.

Delmarva Antique Dealers Association, "A Guide to Antique Dealers on Delmarva", 1978.
The Falcon, Outlet Quarterly, Vol. 1, No. 1, 1978.

ARTS, CULTURAL AND CIVIC GROUPS

Delaware State Arts Council, "Arts & Cultural Groups in Delaware".
Recreation, Promotion & Service, Inc., "Calendar of Events", 1978.

APPENDIX B: ESTIMATES OF VISITOR VEHICLE-MILES

No firm data exist on the vehicle-miles on Delaware's highways, streets and roads attributable to out-of-state visitors. However, given the data available, there are two approaches to estimating this figure.

METHOD A

Estimates of visitor vehicle-miles can de derived from the public use tapes of the 1977 National Travel Survey (NTS). For trips destined to Delaware, or involving an overnight stay in Delaware, we can estimate the number of visitor automobile, truck and camper vehicle-miles based upon the proportion of days spent in Delaware. That is, miles per trip for a given travel party are distributed among states visited according to the distribution of days spend in each state. This is 390 million vehicle-miles, according to a special tabulation of the 1977 NTS.

To this should be added vehicle-miles of auto-truck-camper travel parties who pass-through the state on trips to places 100 miles or more away from home, but do not spend the night. There were 473,000 such vehicle visits by non-residents during 1977 according to the NTS. If we assume these trips were centered around the 25-mile stretch of I-95 in the northern part of the State, and the average pass-through visitor not spending the night or destined for a site in Delaware traveled an average of 25 miles in the State per visit, the total vehicle-miles for this traffic is 118 million.

The only other type of vehicle non-resident travelers might use to visit the State is the bus. The 1977 NTS indicates 23,000 travelers spent 24,000 nights in Delaware traveling by bus. If we allocate a portion of the 7.4 million travel-party miles traveled throughout the U.S. to Delaware in proportion to the ratio of bus-nights in Delaware to total U.S. bus-nights, this produces three million additional vehicle-miles for buses.

Finally, Census data from earlier travel surveys indicate those traveling less than 100 miles away from home, but spending the night away from home, accounted for an amount equal to four percent of vehicle-miles for trips over 100 miles away. This factor can be used to adjust the sum of the above to reach a total for all overnight trips away from home, which should be similar to all trips to places 50 miles or more away from home. To summarize:

Auto-truck-camper non-resident visitors destined to Delaware or spending one or more nights	390 million vehicle-miles
Auto-truck-camper non-resident visitors spending no nights in Delaware	118 million vehicle-miles
Bus non-resident visitors in Delaware	3 million vehicle-miles
TOTAL FOR 100-MILE TRIPS	511 million vehicle-miles
Adjustment for short trips	x 1.04
TOTAL FOR ALL TRIPS	531 million vehicle-miles

Comparing this to the 4,038 million vehicle-miles for all travel on all Delaware street and roads, as estimated by the Delaware Department of Transportation, the proportion attributable to out-of-state travelers is 13 percent.

METHOD B

The Bureau of Traffic, Division of Highways, Delaware Department of Transportation has independently estimated the percentages of street and highways usage attributable to out-of-state visitors. These percentages, broken down by county and other areas, have been applied to total operating and maintenance costs, as follows:

County or Area	Total FY 1978	Visitor Cost Proportion	Attributable to Visitors
New Castle County	$1,929,390	10%	$ 192,939
Kent County	1,624,062	15%	243,609
Sussex County			
Areas 1 & 2	608,471	10%	60,847
Area 3	332,660	50%	166,330
Areas 4 & 5	660,045	90%	594,041
County-wide crews	973,629	50%	486,815
Smyrna Rest Area	68,972	100%	68,972
Statewide Roadside Development	83,510	0%	0
Signal Maintenance and Repair	300,000	10%	30,000
TOTAL	$6,580,739	28%	$1,843,553
		100% Management Cost	+ $1,845,553
		GRAND TOTAL	$3,687,106

This is 10 percent of the Department's total operating fund disbursement for fiscal year 1977.

The Bureau of Traffic also provided estimates of capital disbursements for the Department of Transportation. Noting there is no reasonable way of estimating actual capital costs of visitor related transportation projects given the time and resources available for this study, the Bureau has estimated that the five-year annual average for capital disbursements for all projects is $39,223,800. U.S. funds accounted for $21,993,500 of this, leaving $17,230,300 to be apportioned between resident and non-resident travel. Using the 10-percent factor developed above, this method suggests that $1,723,000 be attributed to tourism.

The grand total of highway spending attributable to non-resident travelers is the sum of operation and capital disbursements out of State funds, or $5,410,100 according to this method.

SUMMARY

Method A, based on 1977 National Travel Survey estimates of motor vehicle mileage and days spent in the State, suggest out-of-state visitors accounted for 13 percent of vehicle-miles traveled on Delaware's highways, streets and roads during

1977. This figure could be used to represent the amount of Department of Transportation spending during the year attributable to out-of-state visitors traveling in the State.

The Division of Highways has estimated that 10 percent of Departmental spending out of State funds are attributable to out-of-state travelers, employing Method B.

The two methods suggest that between 10 and 13 percent of State spending for highways is attributable to non-resident tourists or between $5.4 million and $6.9 million in fiscal 1977. For the purposes of this study, the mid-point of the percentage range was selected, or 11.5 percent of total State highway spending. This produces a dollar estimate of $6,128,200 for State highways spending attributable to non-resident travelers in 1977.

APPENDIX C: EXPENDITURES AND REVENUE OF THE DELAWARE DIVISION OF PARKS AND RECREATION ASSOCIATED WITH RESIDENT AND NON-RESIDENT USE

TABLE 1: ESTIMATED TOTAL EXPENDITURES OF THE DELAWARE DIVISION OF PARKS AND RECREATION ASSOCIATED WITH NON-RESIDENT/TOURIST UTILIZATION: 1977

	A		B	C		D	E
STATE PARK	OPERATION & MAINTENANCE (100% STATE FUNDS)	TOURISM FACTOR (a)	OPERATION & MAINTENANCE ASSOCIATED WITH TOURISM	CAPITAL IMPROVEMENTS (50% STATE FUNDS EXCEPT AS NOTED)	TOURISM FACTOR (a)	CAPITAL IMPROVEMENTS ASSOCIATED WITH TOURISM	TOTAL OPERATION & MAINTENANCE PLUS CIP ASSOCIATED WITH TOURISM
BRANDYWINE CREEK	92,229.08	11.8%	10,883.03	337.71	11.8%	39.85	10,922.88
CAPE HENLOPEN	203,035.33	69.4%	140,906.52	117,332.81	69.4%	81,428.97	222,335.49
DELAWARE SEASHORE	392,602.54	65.9%	258,725.07	209.08	65.9%	137.78	258,862.85
FORT DELAWARE	135,257.48	19.4%(c)	26,239.95	99,539.96 (b)	19.4%	19,310.75	45,550.70
HOLTS LANDING/ FENWICK ISLAND	57,070.91	65.9%	37,609.73	-0-		-0-	37,609.73
KILLENS POND	85,291.70	16.1%	13,731.96	37.97	16.1%	6.11	13,738.07
LUMS POND	134,341.67	32.5%	43,661.04	285,215.18	32.5%	92,694.93	136,355.97
TRAP POND	96,206.02	46.2%	44,447.18	82.86	46.2%	38.28	44,485.46
WALTER S. CARPENTER	28,247.59	14.0%	3,954.66	130,043.60	14.0%	18,206.10	22,160.76
BELLEVUE	30,385.91	19.4%(c	5,894.87	3,348,970.52 (d)	19.4%	649,700.28	655,595.15
OTHER STATE PARK USE	180,272.30	51.2%	92,299.42	20,120.66	51.2%	10,301.78	102,601.20
TOTAL	1,434,940.53		678,353.43	4,001,890.35		871,864.83	1,550,218.26

(a) Based upon the proportion of non-resident users during the calendar year (Travel Use Survey, 1975).

(b) 100% State Funds

(c) Based upon average of out-of-state use for other State Parks in the Metropolitan Region (Travel Use Survey, 1975).

(d) One time land acquisition expenditure for new park.

NOTES: (1) A & C Total Expenditures $5,436,830.88
(2) B & D Total Expenditures on Tourism $1,550,218.26

Prepared by Stanley W. Von Essen, Jr.

TABLE 2: ESTIMATED REVENUE OF THE DELAWARE DIVISION OF PARKS & RECREATION ASSOCIATED WITH RESIDENT AND NON-RESIDENT TOURISM UTILIZATION

		A	B	C	D	E	F
STATE PARK	TOURISM FACTOR % - (a)	TOTAL REVENUE	NON-RESIDENT (d, f) USER FEES	RESIDENT (d, f) USER FEES	OTHER SOURCES (d) ASSOCIATED WITH RESIDENTS	OTHER SOURCES (d) ASSOCIATED WITH TOURISM	OTHER (c) NON-APPLICABLE SOURCES
BRANDYWINE CREEK	11.8	$ 7,356.00	$ 279.00	$ 4,777.00	$ -0-	$ -0-	$ 1,300.00
CAPE HENLOPEN	69.4	160,478.18	35,346.00 (g)	10,573.00 (g)	32,374.63	73,424.82	8,759.73
DELAWARE SEASHORE	65.9	448,259.27	97,998.00 (g)	31,052.00 (g)	91,228.93	176,304.60	51,665.74
FORT DELAWARE	19.4 (b)	5,482.12	(e)	(e)	4,418.59	1,063.53	-0-
HOLTS LANDING/ FENWICK ISLAND	65.9	14,654.00	11,643.00	3,011.00	-0-	-0-	-0-
KILLENS POND	16.1	12,334.00	3,279.00	8,546.00	397.69	76.31	35.00
LUMS POND	32.5	58,616.75	18,236.00 (g)	19,703.00	11,223.19	5,403.76	4,050.80
TRAP POND	46.2	49,629.80	6,256.00	3,643.00	21,375.17	18,355.63	-0-
W.S. CARPENTER	14.0	1,451.00	(e)	(e)	82.56	13.44	1,355.00
BELLEVUE	19.4 (b)	2,498.29	(e)	(e)	-0-	-0-	2,498.29
OTHER PARKS	51.2	57,870.00	38,027.00 (g)	19,853.00 (g)	-0-	-0-	-0-
TOTAL		$818,629.41	$212,064.00	$101,158.00	$161,100.76	$274,642.09	$69,664.56

(a) Based upon the proportion of non-resident users during the calendar year (Travel Use Survey, 1975).
(b) Based upon the average non-resident use for other State Parks in the Metropolitan Region (Travel Use Survey, 1975).
(c) Due to non-participation of non-residents, e.g. property rentals.
(d) Tourism factor applied for this revenue category.
(e) No user fee charged.
(f) Non-resident user fees are twice that of resident user fees.
(g) Surf fishing permits and entrance fees included in this category.

Total Revenue Associated with Tourism (B + E)	$486,706.09
Total Revenue Associated with Residents (C + D)	$262,258.76
Total Revenue not applicable to Resident non-resident Tourism distinction (F)	$ 69,664.56
Total Revenue (B + C + D + E + F)	$818,629.41

Prepared by Stanley W. Von Essen, Jr.